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ABSTRACT

This book offers a range of original perspectives on issues of planning and managing education in small systems. It is based on the proceedings of a conference held at the University of London's Institute for Education, supported by the European Community Directorate General for Development. The conference addressed a range of themes relevant to policies and practice within educational sectors in small systems of Europe, the Commonwealth, and the Africa and the Caribbean and Pacific (ACP) group. Part 1 defines and maps the intellectual terrain. Part 2 presents case studies from the following small system contexts: Lesotho, the South Pacific, West Indies, and Bhutan. The third part presents two chapters on regional cooperation. The following key conceptual issues dominate the discussion: (1) definitions and conceptualizations of smallness; (2) the nature of decision making; (3) disadvantages of smallness; (4) advantages of smallness; (5) patterns of educational provision; and (6) appropriate models and alternative pathways to development. Appendices contain data on geographic and demographic factors and economic, political, and social indicators. Contains an extensive bibliography. (LMI)

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Policy, planning and management of education in small states

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Edited by

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Preface

In recent years, the number of small states that are members of UNESCO has grown appreciably; today, more than 20 per cent of the 172 Member States of the Organization can be considered as belonging to this category. This phenomenon has been accompanied by a rapid rise in the number of academic studies devoted to small states, at the outset being undertaken mainly by economists, sociolologists and geographers but now receiving the attention of a growing number of educators and educational planners.

Since its foundation some 30 years ago, the IIEP has constantly reserved a place on its agenda for the study of small states and has offered training opportunities to educational planners from a large proportion of these countries, especially from the African, Caribbean and Pacific regions. Although the present volume is not a direct result of the Institute's programme activities (it is in fact based on a seminar held at the University of London), it is very appropriate that the IIEP should be publishing and disseminating this useful collection of papers which brings new insights to a subject that is of growing importance in the international sphere.

I wish to thank Kevin Lillis for his leadership in this enterprise; he not only organized the London conference, he also selected and edited the papers for publication prior to asking the IIEP to take the responsibility of publishing them.

I feel sure that the volume will generate much attention and will be received with considerable interest by educational planners and administrators worldwide – in small states and in larger states alike.

Jacques Hallak
Director, IIEP

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Chapter I

Introduction: key issues and perspectives

by Kevin M. Lillis

This volume offers a range of original perspectives on issues of planning and managing education in small systems. The material in it originates from a Conference held in the Centre for Multicultural Education, University of London, Institute of Education, with financial support from the European Community Directorate General for Development. The Conference addressed a range of themes relevant to policies and practice within educational sectors in small systems of Europe, the Commonwealth, *Africa and the Caribbean and Pacific* (ACP) group of countries supported by the European Community as well as from wider afield. It also discussed micro-systems within larger national systems. The ambitious agenda sought to continue and to raise the international debate and discussion on the issues that were already high in national developmental fora and in the agendas of international agencies like UNESCO and the Commonwealth Secretariat. What are the distinctive features or commonalities of educational problems in small states? To what extent are they or are they not similar to those experienced by larger systems? What are the teacher education, higher education, labour market, curriculum development and materials provision implications of planning and managing small systems? Are there specific linguistic, religious, social, class and cultural implications of planning and managing education within small multicultural societies?

The book is divided into three parts. *Part I* is essentially concerned with defining and mapping the intellectual terrain. *Part II* presents case studies from a number of small system contexts. *Part III* presents two chapters on regional co-operation. Several key conceptual issues dominate the discussion.

1. Definitions and conceptualisations of smallness

Factors of scale, isolation and dependence are inextricably intertwined to create the contexts of marginality, underdevelopment and vulnerability that are dominating features of small country systems George (1985); Harden (1985), especially those in developing countries which provide the contextual focus within the book. They are of critical significance to education and human resource development – although not the only dominating characteristics of small systems. Miller (1992), for example, hardly raises them as significant parameters. Nevertheless, it is impossible to generalise because of the uniqueness and idiosyncrasy of each context. Many of the chapters take as a starting point the exploration of the connotation in specific contexts of the notions of smallness, the implications of it and how the specificity of smallness makes a difference to the planning and management of the systems under discussion, from both beneficial and disadvantageous perspectives.

What is small is itself a point of debate. Several of the writers invoke *Shumacher's* familiar cliché, relating smallness to beauty. Is smallness just the opposite of largeness or is it something different? Several chapters accept a specific demographic threshold [e.g. one million people in the case of Atchoarena (Chapter IV) and Luteru (Chapter X), two million in the case of Packer (Chapter IX) and in between in the case of Bacchus Chapter V)]. Smawfield (Chapter II), though, draws attention to the contentiousness of the criteria used to measure smallness as well as the inflation of demographic measures of smallness. The Commonwealth Secretariat's erstwhile notion of one million inhabitants has now reached two million and recent discussions have pushed the threshold to three, and even five, million (see, for example, *Chapter IV* by Atchoarena). Bray's (1991) list of 71 small states and territories is based upon a one and a half million threshold. The book does not seek to resolve these discrepancies, leaving them to illustrate the contentious nature of the debate. Importantly, Bray's focus is upon the nation-state. The focus of this book is wider, being concerned with small systems, some of which are not nation-states *per se*. The discussion is perceived as applicable to the small systems of the peripheralised islands of the

Scottish (or Irish) Gaeltacht. These possess characteristics to those island territories discussed in the book, or to many of the British Dependent territories (Anguilla, British Virgin Islands, Cayman Islands, Falkland Islands, Montserrat, Pitcairn Island, St. Helena and dependencies, Turks and Caicos Islands), the Netherlands Antilles (Bonaire, Curacao, St. Maarten, Saba, St. Eustacius) and Aruba, the French Territorial Collectivities (Mayotte, St. Pierre and Miquelon), the French Overseas territories (New Caledonia and dependencies, French Polynesia) and the *Départements d'Outre-Mer* (Martinique, Guadeloupe, St. Martin, St-Barthélemy, Guyane).

So, too, do the so-called homelands in Southern Africa for example. Similar problems exist in some loosely-coupled federations where smaller, and autonomous, sub-systems are not necessarily suborned to central political control. Zanzibar, for example, is a fully integrated political component within Tanzania (formerly the United Republic of Tanganyika and Zanzibar) but is fully in control of all dimensions of educational decision-making and policy provision. Moreover, the problems of planning and managing education may impact upon educational provision for enclaves and minorities (cf., for example, Hughes (1992) discussion of education in Ulster, or the problems of planning for Haitian refugees in Turks and Caicos Islands *inter alia*).

Smawfield (Chapter II) also raises the demographic connotations of 'small', 'very small' and 'micro' whilst Luteru (Chapter X) provides a useful taxonomy of small systems in the Pacific region based upon size of population. Smawfield's distinction is particularly crucial when seeking to determine the possibilities of post-secondary education, for example. Whilst a small state of, say, 250,000 people may sustain a large Community College, a technical College and a Teacher's College (cf. Barbados), a micro-state with a population of less than 10,000 people (e.g. Anguilla) remains essentially educationally topless by dint of the severe lack of critical mass of trainees to sustain post-secondary institutions (cf. Packer, *Chapter IX*). Many taxonomies seek to categorise small states according to a combination of demography, land area and GNP – e.g. under 2 million people, under 100,000 square kilometres and under US$500 of GNP. Whilst many of the small systems discussed within the book do, almost by definition, fit into these categories, there remain the problems of categorising the small and wealthy e.g. Bermuda, Brunei, Cayman Islands, Jersey, Switzerland, Brunei, pre-August 1990

Kuwait and the myriad of oil-rich Emirates. It is possible, as these suggest, to be small and rich [cf. Attwood; Bray (1989)], although, as Mani (1992) illustrates, wealthy Brunei shares some of the problems of educational disadvantage and retains segments of underdevelopment. Nevertheless, the discussion in the book focuses predominantly upon small and poor as well as upon the associated issues of underdevelopment in these contexts.

Whilst small and poor countries face the greatest problems of planning and managing human resources, some of the above country examples suggest that the small and rich i.e. those possessing GNP substantially greater than US$500 GNP *per capita*, may still share other problems of scale and isolation as well as (cf. Kuwait) vulnerability, especially as wealth may be concentrated in the 'Sultanate' and not equitably distributed. The political economies of many of the contexts discussed in the book are characterized by structured underdevelopment: high degrees of economic dependence on external economic hegemonies; over-reliance on protected markets and preferential pricing for products suffering either poor prices or quality problems (e.g. sugar and bananas in the case of the West Indies); 'penetrated economies' dominated by foreign investments; over-reliance by some on tourism [often mass tourism, itself a phenomenon loaded with problems ranging from cultural distortions to the importation of AIDS, drugs trafficking and the illegal use of drugs, all posing greater and greater threats to fragile economies, [see Hall (1990)]. In many contexts (cf. Caribbean), tourist receipts and remittances from income from migrants is now essential to bridge the huge merchandise balance of payments deficits. Equally, the country contexts discussed in the book are characterized by large service sectors; limited resource bases and low levels of investment; massive dependency upon large external metropoles for finance, trade, security and defence; mass migration and large overseas diasporas resulting from the skill/brain-drain, often of the educated élite – hence a high work dependency upon external metropoles for employment and wages; by deepening recession and by high levels of external debt. The high proportions of GNP (often 30 per cent - 45 per cent) derived from foreign trade and the high dependence upon imports (especially foodstuffs) intensifies the economic and political vulnerability of small states [Ramsaran (1987); Worrell (1987); Commonwealth Secretariat/CARICOM (1988); Demas (1988); Henry (1988)]. They are markettakers rather than market-makers: hence the threatening imminence of 'Europe-1992', see [Stevens (1991)]. In some contexts (cf. Fiji, Jamaica, Mauritius, Montserrat, Western Samoa) the vulnerability is also intensified by recent natural disasters (as well as by lack of preparation and defence against them), although, as Hurricane Andrew revealed in Florida, none are safeguarded from them.

A country may be large in geographical area but may reveal a homogeneous administrative structure and be under relatively simple administrative control. Hence, a small system may be one in which government is so compact as to be easily comprehended; the key decision-makers are available and accessible and it is possible to move easily within and between the key actors and key departments.

Power and control feature as a significant issue in several chapters. Chiew (Chapter III), for example, perceives the notion of smallness as relating to a series of power relationships. This may define the nature of a small periphery in relation to a larger 'mainland' core. What is the role of education as a vehicle to prevent periphery to core migration?

One additional and significant dimension of smallness is the size of the educational system itself and the critical mass of human resources undertaking formal education. Lillis (Chapter VII) illustrates the small size of Bhutan's educational system and the implications of this both for the labour market and for higher education. He also indicates the 'toplessness' of many small educational systems i.e. lacking a higher education infrastructure. This suggests the utility of scrutinising the development of higher education as a means of gauging the size of the educational system: is there no university (cf. Luxemburg); is there a national university (many models); a regional university (South Pacific, West Indies); a proliferation of colleges (South Pacific); a proliferation of post-secondary institutions (e.g. the Association of Tertiary Institutions in the Caribbean)? What is the population threshold and state of socio-economic development above which it becomes feasible to establish a national University is a question which dominates Lillis' discussion on Bhutan but is equally pertinent to, say, The Gambia's debate on upgrading The Gambia College into a national university.

The nature of smallness obviously varies with the context. Many of the chapters focus upon small island microstates. Here the populations may live in close proximity. In contrast, fragmented geographies and highly dispersed populations, living in contexts of spatial isolation and difficult communications of all kinds which intensify the problems of satisfying the whole range basic human needs (including education) are more characteristic of landlocked mountainous states described by Lillis (Bhutan) as well as in Swaziland and Lesotho (Nomso, 1991). Smawfield usefully suggests that small systems may be typologised as (a) islands; (b) archipelagos; (c) littorals; (d) landlocked. The book provides illustrations from each type.

2. *The nature of decision-making*

Inevitably, the nature of educational decision-making in small systems mirrors that of wider public administration [see Baker (1992); Ghai (1990); Jacobs (1975); Murray (1981) 1985; Schahczenski (1990); Kersell (1987), (1988), (1989), (1990)]. Several chapters (cf. Chiew (Chapter III) indicate the highly personalised environments of decision-making in small systems. Smawfield (Chapter II), too, indicates the personalised nature of small country politics, which presents the difficulty of making rational, impersonal decisions and, again in Chiew's words, the difficulties based upon 'objective', universalistic criteria. The intimacy created by the easy availability of decision-makers paradoxically increases the difficulty of impersonal decision-making. Lillis (Chapter VII) suggests, in the case of Bhutan, how small networks of highly placed and powerful decision-makers might influence the decision to create a national University in the face of decisive, 'rational' evidence that the lack of a critical mass of students (a characteristic of small systems) might militate against its success.

In small systems, too, excessive power (either through the gun, the ballot box or hereditary monarchy) may well be more likely to lay within the hands of a tiny clique – or, not totally exceptionally, an individual, see [Baker (1992)]. The closeness of small cliques may intensify conflict and rivalry. Though, the smallness of networks of decision-makers in small countries may be good for consensus, although some hint that individual ambition might override a potential consensus and that the small conflicts and petty rivalries of 'parish-pump politics in gold-fish bowl societies' are more characteristic than consensus. There, thus, appears to be greater visibility of individualised decision-making and, in Smawfield's view, the enhanced visibility of failure that might accompany personalised decision-making often creates a reluctance to take risks and to confront change. At the same time, innovation may well be more readily identified with individual actors than within larger systems. Smawfield suggests that, in the context of sensitivity to change, there are more limited margins of tolerable error in the highly visible contexts of small systems, where the intensity of vested interests may also be seen as greater.

Equally important, as Bacchus (Chapter V) emphasizes, the highly personalised environments are characterized by multi-functional Ministries and Departments as well as by the existence of 'multi-functional administrators' Farrugia; Attard (1989), together with the attendant problems of identifying the individuals with the repertoires of skills required to undertake the multiplicity of roles and of departments with the necessary specialisms to discharge their multiple functions, often in micro-departments, with success [see Bacchus (1967); Kersell (1990)]. The polyvalent demands upon the educational leadership is a key feature of educational systems in small states, see [Goodridge (1985); CARNEID (1991)]. This multiplicity is an especial problem for training these cadres. There are both dangers and advantages in 'person-specific' Ministries, in which individual actors rather than structures and systems dominate the decision-making agendas, and a danger of vested interests (as Bacchus suggests) leading to resisted demands for the advantages of decentralisation. There is an equal danger of person and departmental overload arising from administrative multi-functionality, World Bank, (1992).

3. *Disadvantages of smallness*

Several chapters identify the political vulnerability of small nation states as the major disadvantage of smallness. But is vulnerability synonymous with 'weak', asks Baldacchino (1992/93). The invasions of Kuwait and Grenada (as well as lesser but no less significant externally fermented political turbulence in e.g. Comoros, Maldives and Seychelles), reveal them as preys to external intervention. Recent coups, attempted coups and counter coups (cf. Haiti, Surinam, Ciskei, The Gambia, Liberia) also reveal their vulnerability to internal turbulence. Not only are some of these states potential prey to larger hawks, but they may also be dependent upon them for assistance to resist attempted intervention, as Comoros, Maldives and Seychelles, have done when mercenary groups (possibly from Kenya, South Africa and Sri Lanka respectively) have threatened the stability of the state. But, as The Gambia's relationship with the more dominant Senegal in the short-lived federation of Senegambia suggests, these expediencies may not necessarily be either welcome or productive. The shock waves of vulnerability may be intensified by smallness of scale, although robustness to external shock (economic and climatic as well as political) is a *sine qua non* for survival. Over and above political vulnerability, small systems, Chiew (Chapter III) suggests, are vulnerable, limited and weak in human and financial resources. Hence in economic spheres, they are extremely vulnerable to the shock waves of global shifts and economic recession. Mono-economies are especially vulnerable, as Smawfield (Chapter II) (argues in indicating the post-1992 threat to Caribbean banana-dependent economies. Their low productive capacities are especially sensitive to global economic shifts – oil price hikes, recession and war.

The small pool of talent (often confused with underdevelopment) and the shortage of highly educated and skilled human resources to manage change is a major feature of small systems [see Best (1966); Lewis; Richardson (1984); Zaba (1986); Fergus (1990 (a) (b) (c)]. This is in part linked to issues of the brain-drain, for migration and the skill haemorrhage is a critical constraint upon labour market formation and capacity building [see Abdulah (1981); Guengant (1985); Marshall (1985); Pastor (1985); Segal (1986); White (1987); Anderson (1988); Simmons; Plaza (1991)]. Isolation within and between small systems is a sister of vulnerability. Much of the discussion in the book is centred upon the problem of overcoming the disadvantages accruing from the spatial, political, social and cultural isolation and the dangers of cultural and educational dependency that are interwoven within it. In education systems, this has both a geographical and an intellectual manifestation. Professional isolation is a key feature of their educational systems. This can result both in intellectual inbreeding and in excessive intellectual and cultural dependency upon external influences and a wide variety of (often unwelcome) relationships with the immediate and proximate neighbour, resulting in realistic dilemmas over what constitutes national sovereignty and appropriate models for development. Lillis' study (Chapter VII) of higher education in Bhutan reveals the near impossibility of a small system making an indigenous response to its own felt educational needs in the sphere of higher education and the structural necessity to continue an unwelcome dependency upon (in this case) Indian models of higher education and the personnel accompanying the model as the agents of external dependency. Problems of scale are universally seen as exacerbating the problems of dependency, economic, political and cultural, where, in Smawfield's terms (Chapter II), the 'legacy of mimicry' and educational borrowing is intensified.

Many chapters, too, talk of smallness of scale as being a disadvantage ... of available manpower, institutions and finance [cf. Atchoarena (Chapter IV)]. The notion of scale, whether by land or sea, is relative. Bhutan, for example, may be considered small until an attempt is made to cross it, when it appears the size of Canada, which has 100 times its land mass. As Teasdale, too, indicates, Kiribati, with a population of 68,000 people, has an east-west axis (mostly ocean) equivalent to the land mass of the USA with massive attendant problems of travel and communication (a context paralleled in Bahamas, for example).

Equally prevalently running throughout the book is the discussion of diseconomies of scale emerging from smallness of size and the questions of how to overcome high unit costs – especially in higher education, Lillis (Chapter VII); Teasdale (Chapter VIII); but also, for example, in print runs of textbooks, Smawfield (Chapter II) or in distance teaching, Jenkins (Chapter VI).

4. *Advantages of smallness*

Despite the familiarly rehearsed range of disadvantages, several writers [cf. Chiew (Chapter III)] seek to counterbalance the relative and positive advantages accruing from smallness, not the least being an enhanced sense of nationhood, well articulated in international contexts. It is this sense of nationhood that, in Teasdale's view, affords small states more educational development options and a flexibility in international arenas that is, perhaps, lacking to small ethnic minorities within a larger controlling country. There is, though, a pervasive dilemma over the nature of sovereignty, and national or regional allegiances, so that small systems have an overlapping series of local, regional and metropolitan (as well as 'regional-metropolitan') inter-relationships, as Teasdale sympathetically reveals in his discussion of the University of South Pacific. A crucial relationship is that between the small 'independent' state and a controlling regional policeman, as revolutionary Grenada found, to its cost, with the USA.

As always, advantage is finely counterpointed with disadvantage, for the metropolitan pull may distort attitudes, especially in familiar contexts of lack of employment opportunity, resulting in the population haemorrhage and the brain drain. Chiew argues that smallness of scale may confer particular advantages in terms of the political and cultural cohesion and compactness that accrues from situations of close proximity. She argues that smallness confers the assets of creativity and flexibility and that sensitivity to needs (as well as to feedback upon the impact of action) enhances the capacity for innovation. The compactness of smallness creates an ease of access and communication (as well as the pressure for increased accountability and accessibility of decision-makers). Further discussion focuses upon the potential cohesion and articulation of administrative machineries. Consensus, co-ordination and co-operation are more likely than confrontation, although this may be an ideal view, for, as we have already seen, vested interests may prove the more forceful (cf. Richards, 1982).

Tangibility of human contact (Chiew) the opportunity for human orientation in contrast with the alienation of big systems and greater chances for participation in development and the chance to perceive the consequences of decision-making and participation, Smawfield (Chapter II); Chiew (Chapter III) are cited as advantages to be exploited. Equally, the proximity of individuals suggest there are networks of advantage to exploit rather than networks of constraint to inhibit development, for in these contexts, it is easier to monitor the effects of change as well as to achieve rapid implementation of innovation as a result of widespread participation.

5. *Patterns of educational provision*

Many of the chapters, especially the country and regional case studies in *Parts II* and *III*, provide a range of perspectives on different types, forms, styles, extent and patterns of educational provision and human resource development [see also Smith (1988); Lettsome (1990)]. These range from discussions of policy in the face of the constraints of smallness of scale and Leteru's deep analysis (Chapter X) of external funding support for all levels of educational development in the Pacific islands, to more specific country cases of specific patterns of provision at different educational levels in different country contexts. Even in small systems, enhancement of provision may depend upon improved management information systems across the board [see Mushkin, 1992 on Guinea; Ramatsui, 1992; Burchfield, 1992 on Botswana].

These include:

(a) Higher education

Complementary chapters by Teasdale (Chapter VIII), on the regional remit of the University of the South Pacific in Fiji, and by Lillis (Chapter VII), on the pre-University Sherubtse College in Bhutan both raise questions of dependency and of the critical mass necessary to maintain a high quality higher education institution. Equally, both raise the vital questions (also addressed by Packer (Chapter IX) in his discussion of educational provision in the small states of the Commonwealth) of national needs and aspirations versus regional commitment. Both chapters also raise the key questions of whether there are significant population thresholds below which the idea of a national University is not feasible. Small systems share the problems of meeting higher education needs from within their own institutions, not the least being questions of how to indigenise the processes of curriculum and examination development and shift the paradigms away from the predominant first world recipes (as both Lillis and Teasdale discuss at some length). [See also Payne (1980); Bird (1984); Bray ; Hui (1989), Bray (1990); World Bank (1992)]. Small systems also share the dilemmas of seeking to put the top onto 'topless' systems, but, as Teasdale indicates, the smaller the country, the more difficult the task of providing an effective higher education programme.

Equally, these two chapters (and, to a lesser extent, that by Atchoarena) share the questions of counterbalancing excessively high costs (the most important single issue in higher education in small systems) against national prestige and development, and the fact that universities are seen as attractive lures for potential aid donors, although individual countries face enormous problems in maintaining higher education systems – hence the multi-country university, like the University of the West Indies (UWI) [see UWI (1989); McIntyre (1989);

Sherlock; Nettleford (1990)] and the University of the South Pacific (USP). However, Teasdale (Chapter VIII) indicates the greater organisational (and political) complexity of multi-country institutions with wide cultural, linguistic, environmental, economic and political diversity within and between the countries represented in USP and, to a lesser extent, UWI. These issues, together with additional questions of the different leadership styles, population sizes, resource bases, geographical spread over land and sea, variations in *per capita* GNP and aid *per capita*, intensify the problems of scale, dependency and regionality in Teasdale's classic case study. Lillis (Chapter VII) discusses the alternative scenarios governments may face and the alternative planning options (including regionalism) available for Bhutan whilst Teasdale comprehensively reviews both the challenges (of staffing – national, regional or international?; of finance – government or donor) as well as the underlying achievements of USP. Amongst the latter, he suggests, are the creation of a high quality pool of staffing and an adaptable administrative and management structure – 'hubs and spokes' as opposed to the semi-autonomous campuses in Jamaica, Barbados and Trinidad that characterizes of UWI. Most importantly, though, he suggests that it is the celebration and affirmation of cultural identity that is USP's most significant achievement. Nevertheless, he argues, it is important to see the relationship of tertiary with other post-secondary institutions, discussed in *(e) below*. Importantly, of course, problems in small systems' higher education institutions may reflect the more global crisis in higher education Salmi (1992).

(b) Vocational education and manpower development

Increased vocationalisation characterizes the University of the South Pacific (USP), according to Teasdale. Atchoarena (Chapter IV) considers both the theory and practice of vocationalising education in the small states of the Eastern Caribbean and some of the fallacies that this will, of necessity, promote the manpower necessary for economic development and full employment. He examines the current situation and prospects of manpower planning as it relates to training policies in these and other micro-states. He seeks to clarify the relationships between education and economic development in small countries (particularly micro-states), giving priority to the supposed links between education, employment and

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growth. He concentrates his analysis upon vocational education and training, since (as Packer (Chapter IX) also stresses) this area has received an inordinate amount of government and aid donor investment as a potential panacea for the widespread unemployment characteristic of many small systems. Investment trends in the St. Lucia-based *Organisation of Eastern Caribbean States* (OECS) reflect a clear tendency to respond to manpower needs through the provision of local vocational training institutions, although the growth, equity, cost-effective and external efficiency outcomes of this model of development are non-proven and open to challenge [Sabaroche (1987); Sabaroche; Hogan (1992)].

Atchoarena's review (Chapter IV) of training in the OECS illustrates existing patterns of investment in institution at the post-secondary level. These developments indicate the clear tendency to respond as much as possible to manpower needs by establishing local training institutions. The relevance of this policy through its impact on economic growth, he argues, should be carefully appraised, taking into account the distinctive features, advantages and disadvantages of small states.

Equally, Atchoarena argues that in the areas of decision-making, small scale limits the scope and pertinence of both the manpower requirements approach and rates of return analysis. These limitations lead to empirical methods based on the identification and processing of labour market signals provided by new information systems.

As elsewhere in developing countries, the debate surrounding vocational education is a highly volatile one, for, given the diversity of cultures operating in many multicultural small systems, it can be argued that the paths to development adopted by central government (and their decentralised tentacles – see *Section 6* below) require locally specific skills in their labour forces. How do existing policies ensure that these are met? Caricom (1990); and at what cost? Chin-Aleong (1988) since the search for alternatives will be fruitless if they do not consider costs and financing. The debt crisis is a reality for virtually all Less Developed Countries (LDCs) small systems and the increasing constraints affecting government budgets may well be in conflict with the stipulated objectives of vocational education and training.

Atchoarena argues that efficiency, equity and fiscal balance are important challenges for manpower and educational planning in small states, a theme reiterated by the West Indian Commission (1992).

Drawing from the OECS experience, he queries whether it is possible to formulate some basic principles of manpower planning, especially in micro-states. He tentatively offers an integrated and planned approach that incorporates; (a) the identification of training needs to meet labour force requirements; (b) the definition of training policies, including cost analysis, alternative financing and equity; (c) the development of regional co-operation, articulating manpower planning and the provision of adequate training facilities and programmes. An equally pertinent emergent research study by Baldacchino (1992/93) explores labour market policy, labour relations, labour market formation and human resource management in small developing countries, in this case specifically Barbados and Malta.

(c) Distance teaching

Within her wider discussion, Jenkins (Chapter VI) addresses the issue of the outreach programmes of the University of the South Pacific raised by Teasdale (Chapter VIII). She takes up the theme of the implications of smallness in relation to the recognition that distance teaching is increasingly recognised as a valuable component of formal systems of education. It is used to provide access to education at all levels: its students can be of school age or adults bypassed by the formal system. Distance teaching has particular validity in small countries where fiscal resources for educational expansion and development are limited. Its obvious advantage is to cater for large numbers of students at low unit costs, but requires a substantial enrolment to be cost-effective. Why then is distance teaching appropriate for small systems given that conventional analysis would suggest that it is, in effect, unsuitable? Paradoxically, a number of countries have utilised distance teaching imaginatively and effectively. Jenkins' analysis refers in some detail to examples from USP at the tertiary level and the Lesotho Distance Teaching Centre at pre-university level (although these are equally pertinent in the Caribbean UWIDITE Programme, see [Lalor; Marrett (1986)]. The analysis of the problems and potential of distance teaching in small systems leads to a discussion of the recently established collaborative venture, the Vancouver-based Commonwealth of Learning.

(d) Curriculum, textbook and materials development

Underlying much of the above discussion is the question of providing learning materials at acceptable unit costs and the necessity to seek alternative approaches to provision in small systems Clare; Sheppard (1991). Many small (and dependent) systems face major problems of curriculum development and the localisation of curricula and examinations Cox (1990), especially in the face of lack of expertise to do so and the specific constraints of external school leaving examinations. Holderness pinpoints the role of the South Africa School Leaving Examination in constraining innovation in Bophutatswana, but other exemplifications are equally pertinent. The Gambia's distinctive location within membership of the regional West African and Caribbean Examinations Councils and the search for appropriate national educational identities are, for example, intertwined in complex ways that impact upon the peculiar and justifiable national, intranational and international pressures for textbook, curriculum and examination reform [Sarr (1992); see also Bell-Hutchinson (1988); Voeth (1990)]. Smawfield suggests how national dichotomies and plural allegiances may undermine attempts to localise curricula and to create a national curriculum and Lillis reveals how, in Bhutan, the prevalence of Indian styles and models of pedagogy constrain national creativity in these processes.

(e) Multi-functional institutions

Packer (Chapter IX) (and to a lesser extent Lillis (Chapter VII)) discuss how in small systems there exist great pressures to provide a multiplicity of courses and qualifications that satisfy both national needs and international accreditation. In contexts where it proves impossible to provide specialist post-secondary institutions, the response (cf. the Caribbean) has been the emergence of polyvalent multi-functional post-secondary educational institutions, often acting as centres of specialisation or centres of excellence, e.g. Antigua State College and Sir Arthur Lewis Community College in St. Lucia (Barnett et al. 1988; Barnett, 1990). Another response is the attempt to 'top up' through the provision of small community colleges (cf. Teschner's 1992 (a) and (b) discussions on Montserrat and the British Virgin Islands), although the politically-driven origin of some initiatives can lead to intense friction between governments and donors over funding feasibility. Lillis describes Sherubtse College as a facade of a tertiary institution but possessing the feel of a school in ethos and pedagogy. Teasdale, too, indicates that many aspects of USP label it as an upper secondary school – both of which indicate the need for a proliferation of the polyvalent multi-functional post-secondary institution but with careful attention paid to questions of economies of scale, critical mass, cost-effectiveness and sustainability.

6. *Appropriate models and alternative pathways to development*

Many chapters take up the central question of the appropriate pathways to development, for unsuitable development strategies may exacerbate the problems of poverty by constraining development possibilities. Small size is, thus, but one determinant of the thrust of development. A key issue raised by implication is whether appropriate models for planning and management of education and human resource development in small systems are big system models writ small.

Bacchus analyses the concepts of decentralisation and the pressures for it within small systems. Given the complexity of the political economies elaborated in this introduction, what form and style does decentralisation take? How different is it in islands, archipelagos, littorals and landlocked systems? The degree of decentralisation is contingent upon the pursued development strategy, itself constrained by geographical and economic scale. The administrative imperatives of archipelagos (e.g. Bahamas, Solomon Islands and Maldives) covering large oceanic areas differ from the mountainous landlocked systems (e.g. Bhutan), where geographical isolation is an impediment to communication. Nevertheless, the question of how to achieve decentralisation Prawda (1992) and, given the personalisation of networks in small systems, whether it is possible, feasible or desirable, is a central theme in Bacchus. Equally, do innovations targeted at decentralised administration safeguard the interests of all constituent groups in small systems, especially linguistic, religious or cultural minorities in multicultural contexts?

The above expose the limitations of existing models for development and call for the search for alternative pathways to relevant development as part of the search for the exploitable assets of smallness [see

Higginson; Griffiths (1991); Miller (1991); SPEAR (1991)]. Chiew (Chapter III) argues for the need for a sound philosophical framework. However, much of the discussion takes an economic focus, concentrating on the questions of the aggregation of numbers ('the critical mass') necessary to achieve economies of scale. Lillis (Chapter VII), in particular, identifies alternative planning options in higher education (in Bhutan, but generalisable into other small contexts e.g. Maldives) and the problems of structural innovation in the absence of the critical mass of human resources for institutional development in education and in employment (cf. Bah-Lalya; Maurice (1992) references to Guinea).

All these raise questions about the necessary and sufficient conditions for managing reform and the development, diffusion and dissemination of educational innovation in small systems [see also Lewin (1992); Lacey (1992) on innovation in the Seychelles; Sarr (1992) in The Gambia; Stuart (1992) in Lesotho)].

Two major perspectives emerge within the search for alternatives pathways to development:

(a) Re-examination of the role of regional co-operation

Atchoarena concentrates upon regional co-operation within the eastern Caribbean. In the Organisation of Eastern Caribbean States (OECS), it is seen as inevitable that co-operation between Member States is an appropriate pathway for enhancing education and human resource development through economies of scale and the achievement of critical mass emerging from the harmonization of structures, curricula, materials provision, legislation OECS (1992). However, there remain the inevitable tensions of national sovereignty and development that threaten to undermine the imperatives for sub-regional integration. The same tensions exist within the wider CARICOM framework.

May regional co-operation overcome indigenous infrastructural weaknesses! Teasdale (Chapter VIII) indicates the strength of regional co-operation in USP. Packer (Chapter IX), especially, examines the role of regional co-operation within the Commonwealth Caribbean and Pacific where inter-governmental collaboration has been seen as the key vehicle for offering services, encouraging the utilisation of the complimentaries of human and material resources, minimising expenditures and creating solidarity in the face of pervading vulnerability. Nevertheless, citing examples of successful regional co-operation and inter-dependency (e.g. the West African and Caribbean Examinations Councils) and less successful models, he calls for a re-examination in the contemporary context of the utility of this approach. Lillis (Chapter VII), though, suggests the need for Bhutan and Maldives to collaborate together and with the larger countries of the region in the development of higher education within the context of the *South Asian Association for Regional Co-operation* (SAARC).

Of course, educational regionalisation is totally dependent upon macropolitical regionalisation. Whilst both the Caribbean Examinations Council and the University of West Indies have sustained themselves as successful regional institutions, other endeavours to generate the benefits of regional and sub-regional co-operation have floundered as a result of regional political fragmentation – despite the rhetoric suggesting otherwise and despite the work of e.g. the West Indian Commission. At a sub-regional level, even the relatively simple OECS post-secondary centres of excellence concept is under threat (Sabarochè; Hogan, 1992). Whilst outsiders may see the advantages of co-ordination it might well become counter-productive to push the notions of regional integration further than the regions themselves want the process to go!

(b) Re-examination of the role of aid

Political independence is not synonymous with economic, educational and cultural independence. In many of the contexts in the book, 'independence' has often been accompanied by both an increase in aid to satisfy high national (and nationalistic) expectations, especially in education, and in the proliferation of donors. Luteru (Chapter X) focuses specifically upon the role of aid and technical co-operation in supporting the development of education within the Pacific countries Tilak (1988). He shows that, with the exception of Fiji, the *Pacific Island Countries* (PICs) are heavily dependent upon aid resources (especially Australian and New Zealand) to finance the bulk of development activities and strategies, a situation analogous to that in the Anglophone Caribbean. The inability to be financially self-sufficient is exacerbated by the poor economic base, small populations and land masses, geographical isolation and vulnerability to fluctuating world primary commodity prices. On a *per capita* basis, he argues, the PICs are the most aided in the world, cf. Connell (1986), and Smawfield (Chapter II), too, suggests that small systems are generally more aided *per capita* than their larger counterparts. However, aid flows have recently almost certainly reduced and are likely to reduce even further. With increasing debt burdens all round, this almost certainly means net resource flows to education are decreasing considerably. Luteru (Chapter X) maps the ways in which aid both facilitates and constrains development, especially the capacity for self-sufficiency upon which national self-esteem is based. Packer provides ample illustration of similar support in the Caribbean. Lillis (Chapter VII) suggests some of the dysfunctionalities, institutional, epistemological and pedagogical, as a result of Bhutan's dependence within its higher education sub-sector upon manpower from the Colombo Plan for Technical Co-operation. It is Luteru, par excellence, who calls for a rescrutiny of the role, costs, benefits, impact and motivation as well as 'aid-driven pressures' of donors in the areas of educational and human resource development in small systems. Inevitably, there is interplay between governments and donors. Not the least important is the view of the Washington-based donors. In the Caribbean, the World Bank's leadership of the *Caribbean Group for Co-operation in Economic Development* (CGCED) places it in a powerful position, which might not be matched with empathy for the parochial concerns of the small system members of the group.

However, it must not be forgotten that structural adjustment policies are likely to hurt most the smallest and to bite into educational finance in advance of other, harder sectors [Caribbean Development Bank (1990); Commonwealth Secretariat (1992)]. With aid flows decreasing, increasing debt burdens, sustained 'adjustment fatigue' traditional markets (like sugar, bananas and the perennially fickle tourist industry) at risk (and further threats imposed in the Caribbean, for example, by the European Single Market and by the North American Free Trade Agreement), and little capacity to find new alternative niche markets (off-shore finance excepted), the adjustment process if threatening to further erode the quality of many educational systems. Hence, short of imaginative searches for alternative and diversified sources of finance to enable decision-makers reach their policy trade-offs, many small systems have little alternative to donor dependency in their attempts to solve their own versions of the global fiscal crisis in education. One alternative is, as Guyana perhaps illustrates, across the board atrophy and decay of educational infrastructure and quality. The other is a continued search for sustainable human resource development, private sector development, foreign investment, prudent economic management and cost-effective use of limited resources. As in trade, so in education: small systems need to come to terms with shifting contexts that provide new opportunities as well as new risks.

7. Conclusion

Whilst the above introductory scenario seeks to suggest a framework of commonalities, the chapters themselves reveal that clearly there are distinctive country-specific problems of conceptualisation, of policy and of development.

Despite recent increasing focus on the development of small systems much of the work on education and development and, indeed, on education and societal diversity over the last three decades has taken place in medium or large nation states. One of the crucial needs in undertaking the study of education in small systems is the need to examine the hypothesis of whether the notion of smallness as uniform is true. Is it, in fact, true that small states are relatively mono-dimensional in their developmental needs? How multi-dimensional are they? How multicultural? How multilinguistic? (Attien, 1992). To what extent are they scaled-down versions of large states? To what extent can they expect to become, or remain, homogeneous with close links between 'blood and soil'? Will they veer towards fragmentation or towards integration?

These questions and the problems and potentials of educational and human resource development systems in small states [Throsby (1987); OECS/EEC (1988); Loubser et al. (1989); OECS (1991); World Bank (1992)] are central to the choice of appropriate development strategy since they may reveal very complex messages about the ways in which the systems may or may not be optimum forms of 'purer' communities and the ways in which they may retain their vulnerability within the wider international system. Clearly, as the Kuwait context alone suggests, there is a need for some rethinking on the regional and international arrangements that ensure their security. Such co-operative and supportive bases might also allow for a more creative and useful collaboration to maximise, in educational terms, the use of the administrative, technical and educational skills which are shared regionally but without impairing the identity of small systems.

Hence, there are still emergent sets of problems to be explored. The chapters which follow enable such an exploration of the complex interplay of issues at the heart of planning and managing education and human resource development in small systems.

Part I

Macro-perspectives and issues

Chapter II

Notions of smallness: what are they and what are their implications?

by David Smawfield

1. Introduction

Are small country education systems distinctive? If so, is a discrete field of study that is addressed to them justified, and what are the implications for policy-making? At the heart of these questions is the notion that 'small countries' might share common characteristics, enjoy certain advantages and experience problems by virtue of their scale.

This chapter provides a brief review of the nascent field of small country study, including the definition of 'smallness' and identifies views that have been forwarded in respect of smallness and its putative characteristics, benefits and problems.

2. Evolution of a paradigm

The idea of 'small countries' as a phenomenon meriting discrete academic attention is at least twenty-five years old. The Institute of Commonwealth Studies of the University of London, between the years 1962 and 1964, organised seminars exploring such a theme resulting in the publication, 'Problems of smaller territories', Benedict (1967) and 'The economics of development in small countries', Demas (1965).

In addition, a doctoral thesis by Harrigan (1972) (a participant at the Institute of Commonwealth Studies seminar) attempted to classify the essential characteristics of 'Raran' or micro-state society before proceeding to use the paradigm as an analytical tool to examine aspects of the provision of higher education in the USA Virgin Islands. That Harrigan went on to apply his Raran model to an educational context is especially significant as the emergence of an interest in small countries from an educational perspective did not emerge until the 1980s.

The year 1972 witnessed a second important conference in the United Kingdom on the problems of small developing countries and this too produced a major work: 'Development policy in small countries', Selwyn (1975). Other publications on similar themes also emerged, e.g. 'Size, self-determination and international relations: the Caribbean' Lewis (1976).

Two additional conferences explored the general nature of 'smallness'. One was held in 1981 in the Canary Islands, Cohen (1983); a second at the University of Oxford in 1985 Clarke; Payne (1987).

What is believed to have been the first ever conference on educational issues in small countries was held at the University of Hull in 1984 Brock; Ryba (1980); Brock (1982); Brock (1983). Interest had been shown elsewhere by Conroy (1982). That this area has been explored only in isolated pockets of academic interest may not be entirely unrelated to the characteristics of insularity, which itself tends to be a feature of the small countries world. Nonetheless, multilateral organisations such as the *Commonwealth Secretariat* and *United Nations Educational, Scientific and Cultural Organisation* (UNESCO) now recognise the putative special circumstances of the 'small country' including ramifications for educational provision and its support [cf. Bacchus; Brock (1984); Commonwealth Secretariat (1985); Packer (1985); Watson (1983); Brock (1984); Brock (1985); Brock; Parker (1985); Lillis (1985); Parker (1982); Parker (1983); Parker (1985)]. That they are now doing so perhaps recognises that, if the Commonwealth is taken as an example, more than half of its Member States have national populations of less than two million. In addition to 47 Member States included in the Commonwealth, there are 19 permanently populated associated states and dependent territories, only two (Hong Kong and Brunei) of which have populations exceeding 60,000 inhabitants.

3. *Definitions of smallness*

Population size is not the only criterion of reference in the definition of the term 'small country', although Kuznets (1960) was content to define a small nation merely as "an independent sovereign state with a population of ten million or less". Land area and wealth (as manifested, for example, in Gross National Product *per capita*) have been regarded as equally important indices. Some territories, of course, might readily be classified as small on all three counts; some on one or two. Botswana might be thought of as a problematic case because, despite being 'poor' and having a small population, it has a land area exceeding 600,000 square miles; conversely, Hong Kong has a much smaller land area but a population of over 5 million inhabitants.

Notwithstanding dispute over the criteria that can be used to measure smallness, the determination of thresholds within those domains is, potentially, equally contentious, as the case studies in this volume illustrate. Not many scholars would wish to use Kuznets population threshold of 10 million to indicate 'smallness' nor for that matter those of Demas (1965) who interpreted a small country to be a state with less than 5 million people and 10,000 to 20,000 square miles of usable land. Such difficulties have led to the employment of further sub-divisions of smallness into such categories as 'very small' and 'micro'. Shand (1980), for example, uses these terms to produce a typology for the classification of selected Pacific and Indian Ocean states: small: greater than 250,000 population; very small: 25,000-250,000 and micro: less than 25,000.

It has tended to become accepted that any decision as to where smallness might begin or end is an arbitrary one. Smawfield (1986), however, has not accepted such a conclusion in its entirety, and has constructed a typology in which, when university provision is used as a context, significant thresholds do perhaps suggest themselves. For example, one can usefully distinguish: *firstly*, between territories which can boast the establishment of more than one university; *secondly*, those territories that have a single national university; and *thirdly*, those territories that do not have a university of their own. In a study made of Commonwealth countries the three criteria of *population*, *wealth* and '*degree of development*' (as crudely indicated by percentage literacy rates) were shown to have a bearing on the form, style and extent of the university provision which these territories have chosen or been able to attain. In avoiding conclusions which might be regarded as too deterministic it was, however, also recognised that legacies of colonialism and in particular differing attitudes of respective colonial powers towards university provision are also significant.

The origins of the University of Malta, with a population of approximately 332,000, for example, can be traced back to the founding of the Collegium Melitense by the Jesuits in 1592 (Association of Commonwealth Universities, 1987), well before British influence. Moreover, the USA Virgin Islands, despite an estimated 1984 population of a mere 108,000, saw its national college achieve university status in 1986).

It is members of the third set of countries, those which have not chosen, or been able, to establish a university of their own which might fittingly be regarded as small countries when the context is an educational one and this will be taken as a working definition for this chapter (although other chapters take different frames of reference).

Such countries, so delineated, may be further sub-divided into those, such as Barbados and Fiji, with a campus of a regional university (either of the University of the West Indies or the University of the South Pacific); other regional university participants as 'on-campus countries' (Vanuatu and Antigua, for instance); and the remaining territories which do not enjoy this level of support (such as the Falkland Islands and the Seychelles). The significance of these further sub-divisions will become apparent in ongoing discussion. But before focusing more closely on educational considerations, other ways of classifying land masses according to type lead to observations of some general characteristics of small countries.

4. Taxonomies of smallness

Countries may be classified as (i) landlocked, (ii) littoral or (iii) islands. This last group can also be usefully sub-divided in more than one way. Island nations include those which are single-island states and those which are archipelagos. A distinction can also be made between islands which are volcanic (and thus, usually, predominantly mountains), raised reefs (mostly low) and sea level reefs and islets. All of these characteristics can have their respective consequences for the provision of education Brock (1980). Examples of small countries fitting each of the above-mentioned categories can readily be found and this is a consideration which immediately points up the dangers and difficulties of generalization. Nonetheless, even using common denominators as basic as these can still assist comparative study. It is important, too, to note the significant proportion of small states classifiable as islands. More than 75 per cent of Commonwealth countries with estimated current populations of less than 2 million and all but one (more than 93 per cent) of Associated States and Dependent Territories of the Commonwealth with an estimated current population of less than two million. Some 46 per cent of the same set of island territories with populations of less than 2 million are archipelago states; and among the same group of islands with populations of less than 1 million, 40 per cent are archipelago states Bacchus; Brock; (1987). Any analysis at this level needs, also, to take into consideration further manifestations of the spatial distribution of small island states: noting, for example, that many are located in tropical regions and distinguishing between the majority which form part of two major regional groupings – South Pacific and Caribbean territories – and those which experience a much more marked degree of remoteness (e.g. Maldives).

Remoteness or distance, in the small country context, is but one form of spatial isolation with actual or potential consequences for educational provision. Aerial insulation and the more limited possibilities for cross-border interaction, for example; disparities in the distribution and density of populations, of which the urban-rural dichotomy is but one form; and networks of movement, including that of people, materials and services with the underlying assumption that these conduits are not always associated with considerations of distance, are further aspects of spatial isolation with implications, *inter alia*, for education provision Brock (1984). There are other important variants of isolation, with potential consequences for the provision of education, including social, cultural and political isolation Brock (1984). For many small states, isolation, in all its forms, is a factor of enhanced significance as a result of its tendency to compound and be compounded by problems of scale.

Elsewhere, Smawfield (1985 and 1988) has used a lens analogy to draw attention to the more general significance of scale, suggesting that, as a lens might be capable of inverting, distorting, magnifying, reducing, blurring, bringing into sharper focus, polarizing and creating chromatic aberration, so might the scale factor be perceived, even to the extent of its potential to create aberrations of the 'rose coloured glasses' type: epitomized by the clichés 'small island paradise' and 'small is beautiful'.

As a polarizing lens may prevent certain rays of light passing through it, so the scale factor can eliminate some of the difficulties of providing education experienced by larger countries. Where the lens analogy falls short is in the reverse of this process. In that the scale factor can create its own unique possibilities and difficulties, a lens cannot create rays of light but only interfere with those which attempt to pass through it.

Notions of magnification, reduction and distortion may be explored in a little more detail. It might be reasonable to expect to find some form of advantageous correlation between increasing smallness and decreasing heterogeneity. However, if the small countries of the Caribbean are taken as an example, according to a typology of stratification in West Indian societies constructed by Lowenthal (1972) [see also Farrell (1967)] very few territories are classifiable as 'homogeneous'. (While nonetheless still significant, it is perhaps of little consolation to the few so classified in the Lowenthal typology – the Turks and Caicos Islands and Carriacou, for instance – represent the smallest of the small countries and island units he examined).

As Benedict (1967) points out, so many small countries are:

> **"plural or multiracial societies, composed of different ethnic origins, cultures, religions, languages and traditions ...... [which] aggravates the problems of smallness."**

In applying this generalisation to the specifics of the educational context it is easy to see how problems of educational provision, in conjunction with the scale factor, can be compounded by pluralism. Pluralism, ethnic or otherwise, can lead, for example, to the existence of more than one educational network or system within the confines of a tiny national parameter. For instance, this might take the form of a dichotomy between a private and public sector. As a second example, it is clear that problems of multilingualism, which might be regarded as manifestations of pluralism, can also exacerbate problems of provision in a situation which might already be marginal on account of considerations of scale.

One thinks particularly here about implications for the provision of educational materials Smawfield (1985). Harrigan (1972) employed the term 'national dichotomy' to conceptualize the implications of a further possible dimension of pluralism. He uses the example of USA Virgin Islanders regarding 'themselves as Virgin Islanders and Americans'. This is an attitudinal factor which can seriously undermine, in the small country context, attempts at localisation of educational materials and curricula. Enhancing the local relevance of educational provision (which might include, say, the localisation of some examinations) may be regarded, individually and collectively, by a process of aggregation, as putting in jeopardy prospects for outward mobility: a consideration which also allows for recognition of the frequently made claim that many small countries are indeed 'metropolitan-oriented societies' Harrigan (1972); Smawfield (1988).

5. The dependency dimension

In the same way that it has been suggested that the significance of isolation and pluralism is often heightened by the scale factor so it might be that there is a tendency for scale to exacerbate problems of dependency. There is a tendency of small countries to possess resources limited both in extent and range and an attendant propensity to be subject to over-concentration and to suffer from the vulnerability of a 'mono-economy'.

A high dependence on imports and restrictions, particularly diseconomies of scale created by the smallness of internal markets, are other factors Benedict (1967); Persaud (1985). The implications for educational provision of such factors are significant. One could argue, for example, that restrictions created for economic development in turn impinge on educational development. This might be taken to mean that less money is created for educational expenditure or that there is less need for technical education institutions, when, say, there is no industrial base to be serviced.

One important dimension of economic dependency that must be singled out for more detailed consideration is the question of external aid: not least as the education sector, is, of course, often a key beneficiary of aid programmes. Certainly, many small territories are viable only because of the financial aid and other support they receive from external agencies. An assertion of de Vries (1975), based on 1967-1969 data, that small countries receive more aid *per capita* and as a percentage of Gross National Product than their larger counterparts was still being quoted in the late 1980s Bray; Fergus (1986). Luteru (Chapter X) updates some of these assertions. Even if the contention remains correct, this does not necessarily mean that small countries, as a consequence, should be regarded as particularly fortunate since there are many dysfunctions associated with aid programmes Altbach; Kelly (1984); Thompson (1987); Goodridge; Peters (1987).

While economic dependency may be the most crucial present-day form of dependency for the small country, it is not the only one. Before turning briefly to specific examples of educational dependency, it is important to highlight political dependency and cultural dependency (see Lillis (Chapter VII). For small countries the former is certainly not as pervasive as it was 15 or 20 years ago. Many have become full nation states during this period thus achieving, at least nominally, political independence. Even among those territories that remain colonies (or 'dependencies' e.g. Anguilla, British Virgin Islands, Cayman Islands in the Caribbean, Montserrat, Turks and Caicos) there has been enormous progress in terms of achieving internal political autonomy.

The notion of 'decalage' is interesting. It suggests that, in some circumstances, small countries pass through the same stages as their larger counterparts but with a staggered time interval, probably as a consequence of scale. If it is valid to visualise small countries as presently tending to cluster in a retarded position on a pre-independence/post-independence continuum, this is a factor of considerable significance not least for educational provision. There is a connection between both the drive for independence and post-independence consolidation and insularity, which can, for instance, have ramifications for curricula as obvious vehicles for trying to promote a sense of nationalism and militate against regional co-operation Brock (1984).

Harrigan's (1972) identification of phenomena he terms 'macro-state emulation syndrome' and 'educational mimesis' usefully gives a clue to the kinds of cultural dependency which tend to characterize small societies [see Brock (1984); Lawlor (1985); Fergus (1987)]. Both, it might be suggested, are related to the 'metropolitan oriented society' concept noted earlier.

The former has much to do with patterns of consumption and the influence of mass media, particularly television and the video revolution. Underlying the idea of the latter is the contention that the organisation, structure and orientation of the educational systems of many small countries might merely be seen as an invidious legacy of colonialism. Such systems, the argument goes, represent little more than 'a poor carbon copy' Harrigan (1972) of the metropolitan model, fashioned in and for entirely different circumstances.

6. Educational similarities in small countries

It is remarkable to note the number of small countries which share very similar colonial heritages. In the educational context, the church, for example, has often played a very similar educational role Smawfield (1988); Udagama (1987). Similarly, the widespread influence for many years of examinations such as the overseas papers for the General Certificate of Education (G.C.E.) of the Universities of London, Cambridge and New Zealand is important. There is also an ongoing legacy in the mimicry of what is now substituted.

Educational borrowing is a phenomenon which might reasonably be regarded as universal, but the scale factor may well be the influential in determining the direction of borrowing Smawfield (1985); Rodhouse (1987).

It was probably no coincidence, for example, that the Caribbean Mathematics Project of the 1970s was an adaptation of a mathematics curriculum project in Ghana, and not vice versa. Similarly, Jervier (1977) has pointed out how, in the past, whatever lead was taken by (larger) Jamaica was often followed throughout the 'British' Caribbean region. The widespread adoption in the 1970s of the junior secondary school model, following that country's move, is a particularly striking example.

7. Topless systems

Perhaps the key element of educational dependency *per se* relates to deficiencies in the apexes of small country education systems, a characteristic which might help to define 'smallness'.

Brock (1984) has used the term '*topless* education systems' to describe this aspect of potential disadvantage. It is appropriate to identify some of the implications of this 'incompleteness'. It has been contended that the nature of educational systems is generally such that each tier in the structural hierarchy exerts considerable pressure on levels beneath it Smawfield (1985); Thompson (1977).

Entrance examinations and requirements for secondary schools in those territories which still have such stipulations, for example, tend to dictate the curriculum of primary schools. In the same way, demands of the tertiary level can constrain secondary innovation.

There are other factors which can contribute to a 'downward' influence. Teachers and the types of skills, attitudes and values they imbibe are the products of tertiary educational experience. University staff often serve on secondary examination and curriculum bodies Smawfield (1985). It might be argued that for countries which have established their own national university, presumably to serve national goals, there is likely to be greater freedom of manoeuvre throughout the system. Irvine's (1978) interpretation of Guyana's breaking away from the University of the West Indies to establish its own university and the advantages this could have offered would appear to support such a view. Conversely, for 'topless' education territories there is much greater

> "pressure to provide courses and qualification acceptable for purposes of admission to... overseas institutions,..."
>
> *Thompson, 1977.*

This, along with 'national dichotomy' where it exists, must tend to constrain possibilities for the re-orientation of small country education systems (as Lillis (Chapter VII) also seeks to show). Alluded to is the kind of change which might place educational provision more in harmony with the individual ecosystems of which it forms a part.

The necessity to go abroad to study also tends to fuel metropolitan oriented attitudes. Small countries experience tremendous wastage of educational investment as a result of those failing to return after being sent abroad to study. On the other hand, it could be counter-argued that overproduction of educated manpower causes some countries as many problems as does a skills shortfall. Economically, at least, so-called wastage may not be an entirely negative factor in the small country context. It may help to alleviate unemployment and, moreover, the economies of several small territories are substantially supported by the remittances of absentees. Acknowledging this must not however, overlook the possibly far more serious social price that might be paid as a result of diaspora.

8. *The role of universities*

Universities can take a leadership role in developing societies. They can provide an important research base and are often a hub for curriculum development and the generation of educational materials. Small countries, it might be argued, are denied these possibilities.

But it would be wrong to create an impression that a national university, even if it is affordable, is potentially only an agent for good. To a number of people the ivory tower university is the supreme symbol of an inappropriate colonial legacy Selvaratnam (1986);

> "The whole subsequent history of the University of the West Indies has been the adaptation of the model, based on British experience, to the realities of West Indian conditions."
>
> *Brathwaite, 1965.*

If credence is to be attached to this line of thinking, it could also be argued that small countries which are not burdened in this way have, as a consequence, increased opportunity and scope to consider more radical alternatives – particularly those brought about by advancements in technology. The age of fibre optics, satellite communications, and data bases accessible along telephone lines has the potential to change many previous assumptions about 'smallness', as Jenkins (Chapter VI) illustrates.

9. *Regionalisation*

In an attempt to ameliorate some of the difficulties they have faced, a substantial number of small countries whose spatial grouping has made it realistic to do so have availed themselves of regional compromises. These take the form not only of endeavours such as the Universities of the West Indies and of the South Pacific or the erstwhile Leeward Islands Teachers Training College, but include such ventures as the Caribbean Examinations Council and a whole host of regionally packaged curriculum development initiatives. Such approaches have not of course provided a panacea. Many initiatives have been beset by problems of core-periphery relationships Packer (1985). Brock (1982), introducing the term 'regional metropolitanism' to label this phenomenon, has noted how at least one (usually the larger) country in island group systems tends to become dominant (often as a result of the establishment of co-operative networks) and how often, as a consequence, it reaps a disproportionate gain. The unequal benefits accruing to campus territories of the two Commonwealth regional universities is a classic illustration of this – as many of the non-campus countries of UWI are ready to testify.

10. Common characteristics

Though not quite the same as regional metropolitanism, sufficiently similar to justify mention at this juncture are the kind of core-periphery relationships often found within archipelago small nation states. Typically one, usually the largest, island has taken on 'main island' status (e.g. Grand Turk). As a result, it is likely to be more advanced than others in the group (e.g. Caicos Islands) and may disproportionately enjoy the benefits of 'national' facilities: whether these be as essential as a hospital, as frivolous as 'night life', or as fundamental as an only secondary school. Not only are educational facilities often unequal but outer island schools are often difficult to staff on account of the unpopularity of such postings (as residents of North Caicos would avow).

There are several other general characteristics which might be mentioned. *Firstly*, one can point to the large number of small countries, especially islands, that have turned towards tourism as a major economic plank of development. The 1992 downturn in tourist arrivals is a threat to most Caribbean economies. *Secondly*, several writers have remarked on the pervasiveness of government in the small country world. This,

> "means that very few enterprises are possible without government support, and very few avenues of upward mobility fail to involve the government." *Benedict, 1967.*

Thirdly, these writers have also remarked on the personalised nature of small country politics Wood (1967); Sutton (1987), a characteristic arguably as valid at micro-level of politics as it is at the macro-level.

Fourthly, in small country political systems, several portfolios are often held by one individual and a related feature of this is that Government ministries are often fewer in number and less compartmentalised, while at the same time having broader roles. *Fifthly*, and following on from this last consideration, the multiplicity of roles tends to be prevalent not only among politicians. It is not unusual for civil servants to be engaged in a whole gamut of alternative remunerative activity, from part-time taxi driving to major business ownership and operation.

Some of the implications the above features might have for education will be considered in due course. But characteristics which might also be mentioned at this point, without construing them being necessarily positive or negative, include observable similarities between small country education systems themselves. Islandness, tropicality, the importance of tourism and scale might lead to a degree of unity of curriculum purpose and content.

The overall incidence of small schools is typically greater in small countries than in most larger territories. This may, thus, mean that such educational approaches as vertical grouping have enhanced actual or potential significance for small countries.

11. Disadvantages of smallness

Among the disadvantages of smallness in an educational context are a number of factors which are the converse of characteristics identified previously. Vulnerability has been mentioned apropos of mono-economies.

It is not difficult to imagine the consequences of crop failure on a small country almost exclusively dependent on the sale of bananas (cf. the Windward Islands) or a spate of international terrorism, internal unrest, or a sudden change in foreign exchange rates which could easily decimate a tourist season, or worse. Vulnerability might also take the form of enhanced susceptibility to covert or overt acts of destabilization e.g. the American invasion/liberation of Grenada in 1983 and the numerous, but so far unsuccessful, attempts to topple the Seychelles Government.

Less spectacularly, but probably far more a constant reality for all small countries is vulnerability in the context of sensitivity to change and the small margins of error they can typically afford to tolerate. Let us consider two hypothetical but no less likely educational possibilities. *Firstly,*

> "...in a larger scale situation, when an overhead projector or photocopier fails to function properly the would-be user may not even have to go outside his or her own institutional department before he or she can obtain the use of similar equipment. Whereas this could still be the case in a small ... country, there is a far stronger possibility that the said equipment will not merely be the only machine of its kind within a particular institution but may well be the only one within the whole territory. Presenting the implications in another way: if within educational system or institution 'A' there are ten duplicating machines and within educational system or institution 'B' there are two, the breakdown of one machine will reduce total potential output by as little as one tenth in the case of 'A' whereas it will reduce total potential output by as much as one half in the case of 'B'."
>
> *Smawfield, 1985.*

Equipment failure has not only potentially more serious immediate consequences in a small country, but the speed and ease with which faults can be rectified might also be adversely affected by the scale factor: as a result of an increased likelihood that spare parts and even the appropriate maintenance expertise itself may not be readily available.

Secondly, more tersely put, but avoiding any element of exaggeration nonetheless:

> "of three students sent to train as physics teachers, for instance, one may elect to stay overseas, the second may change to electronic engineering and the third may fail his examinations: no physics teacher..." *Cammish, 1985.*

Diseconomies of scale can result in higher unit costs. More extremely, smallness of scale may be prohibitive. A favourite example is that print runs involved in the production of textbooks are likely to be too small to interest commercial publishers Durston (1981); and there are other factors inhibiting the localisation of educational materials in small countries which are far more prohibitive than this particular consideration

Smawfield (1985). Another illustration might be the possible consequences of scale for the provision of special education. To the misfortune of the few who would benefit from specialised support, there may not be 'enough' children with special needs in a small country educational system to justify the training and employment of an educational psychologist, for example, or 'sufficient' afflicted children to justify the establishment of educational facilities for the mentally and physically handicapped.

More than one writer has identified professional isolation as a small country characteristic Lawlor (1985); Fayon (1977) and how it tends to create 'inbreeding' while at the same time denying or reducing the opportunity to observe good and/or different practice elsewhere. Even when teachers do return from overseas experience charged with enthusiasm and new ideas they may be subject to what Rodhouse (1987) calls "the prophet without honour syndrome": the notion that such is the character of small country societies that returners are often not accorded the status or respect to disseminate or exploit the benefits of their experience.

Indeed, the personalised nature of small country politics, already noted, can have other negative inertias. In a small country context everyone is more or less known to everyone else. Enhanced visibility and hence the attention which failure attracts, makes people reluctant to take risks. Their high visibility can also impede decision-making especially where there is an element of controversy involved. Furthermore, it is harder for impersonal decisions: persons affected are often friends and relatives.

Discussing the personalist nature of small country societies in the context of Montserrat, Bray and Fergus (1986) point out how this "can also lead to intense rivalry which consumes energy that could better be directed elsewhere and obstructs development".

The education system is reportedly suffering from this problem. Two individuals in particular have been in fierce competition for nearly a decade, and their tussle has gradually reached higher echelons as each has been promoted.

Their personal rivalries have thus have had increasingly severe implications for the entire system, and the issues have still not been resolved. In a larger system it would be easier for such personal conflicts to be absorbed and redirected.

It can be argued that multi-functionality tends to lead to personnel being over-stretched and fulfilling no single task adequately. A dimension of this is brought about by the status of nationhood itself. Typically, key personnel often spend many days each year away from the immediate responsibilities of their posts, representing their country at international seminars and conferences, with self-evident ramifications for the system or institutions that still have to operate in their absence. Somewhat similarly, with a small pool of educational personnel it can be more difficult to release people for overseas training without creating problems for the schools which have to operate in their absence. It might be added that in some small countries the actual problem that tends to occur is one of institutions suffering the effects of personnel being absent on training without adequate replacement, not personnel being prevented from taking training.

A final consideration associated with staffing relates to promotion blockages which can perhaps more easily occur in a small country situation, resulting in either frustration or wastage as the ambitious look for alternatives outside the education sector or abroad. While there may be fewer, say, headships or other senior positions to apply for in a small country system it would be spurious to contend that it is, therefore, proportionately more difficult for teachers aspiring to senior positions to fulfil their ambitions. Patently, the proportion of teachers to headteachers or chief administrators is not any greater in a small country system.

In fact, if as has been contended above, schools in small countries tend to be smaller than in larger countries, or bureaucracies tend to be proportionately larger, there may be a proportionately greater number of senior positions available. Yet the problem that scale seems to create is in the absorption process or the flexibility associated with it. If the one post of, say, Chief Education Officer or secondary Headteacher has recently been filled, possibly by a person well short of retiring age, other aspirants to the post are likely to perceive themselves as conceivably having to wait twenty years before a similar vacancy arises again. There is often no alternative way to channel this frustrated ambition. In a larger system there is at least a greater number of vacancies to apply for even though competition is greater.

To conclude the wider discussion of disadvantages of smallness, there is a fairly close parallel to the above points in the provision of, for instance, library books. Research has shown that in terms of the criterion of numbers of library books per head of population, small countries, if anything, tend to fare better than their larger counterparts Smawfield (1985) but when the situation is presented in terms of, say, a *student* conducting research and whose need is probably more urgent than could be accommodated by affecting an international library loan, the chances of the material that the student requires being included among a national total of 7,000 library books [as found in the Turks and Caicos Islands in 1980, for instance UNESCO (1985)] are nowhere near as favourable as among a national total of over 130 million volumes (the corresponding statistic for the United Kingdom). Perhaps to compare a national library collection of a small country to a provincial or municipal collection of a larger territory is more realistic. But again, trying to locate material in another nearby town is likely to be nowhere near as problematic as in another nearby country.

12. Advantages of smallness

Considering the possible advantages of being small, Bray; Fergus (1986) argue that:

> "one of the strongest assets of most small countries is that they are countries, even if they are small ones. If the people of Montserrat were just part of a suburb in a large state, or if the island was merely one of several dozen off the coasts of Papua New Guinea, Canada or Scotland, Montserratians could be much less certain that they would receive the same degree of international attention that they do in fact enjoy."

A second important positive characteristic is the composite one of compactness and close proximity and the advantages which can accrue from ease of access and communication. Many small states are compact, even to the extent that this is a characteristic sometimes more real than apparent. The Seychelles, for instance, comprise some 92 islands spread across 150,00 square miles of the Indian Ocean, but only four islands have permanent populations (and hence schools) and these are closely clustered: Silhouette, La Digue and Praslin are all within twenty-five miles of the main island, Mahé. In a small country situation such as this it might well be possible for an education officer to visit every school in the territory in the same day or for all the teaching force to gather together just as easily and meet together under one roof.

Packer (1985) draws attention to how:

> "it is possible in one street to encounter most if not all the significant figures in the education system from minister to primary school teacher.He also makes the point that in the small country context it is easier for those responsible for policy-making to visualize and subsequently observe the consequences of their decision-making, allowing for a greater degree of realism. Indeed, the effects of change, as a consequence of scale, are likely to be seen more readily and there are likely to be many situations where it is possible to get quicker and more reliable feedback than might be obtained in larger systems."

Cammish (1985) has likened the small country to "almost a laboratory situation for education experiments."

Visibility and personalized politics, in addition to the problem they might create, as discussed above, can also be positive factors in their effects. They tend, for example, to make for increased accountability and greater accessibility. Because all actions are so well scrutinized there may be a tendency for people to try harder. A final advantage for smallness that may be mentioned also turns a disadvantage in on itself. Just as there may be diseconomies of scale for small countries so may, in certain circumstances, those territories reap economies of scale. In terms of the generation of educational materials, for example,

> "the small scale of a particular publishing initiative may simply mean that instead of requiring huge capital investment in production plant... more modest equipment . . . . . on which large scale production runs are either technically impossible or completely uneconomic--may present a far more cost-effective alternative. Moreover, the diminutive nature of an enterprise may well obviate the need for a commercial publisher or a distributing agent or a retailer; the profits they each would have taken thus being eliminated from the overall economic equation and improving cost-effectiveness still further."
>
> *Smawfield, 1985.*

13. Small country dilemmas

As well as the characteristics that have so far been outlined it may well be valid to argue that small countries often face a set of dilemmas that tend to be particular to their special circumstances.

At what might be regarded as the most basic level, a not insignificant number of small countries face real dilemmas about their sovereignty. Of the territories which have not gained independence in the nominal political sense, for some there are dilemmas such as whether or not this is a status to which they should be aspiring ; whether perhaps amalgamation or absorption might be a better option and, even if so, it still might not be straightforward as to what other country or countries they should best consider an association.

Furthermore, for some small countries that have achieved their political independence they have far from left the issues behind them. Certain of them are re-examining decisions. The Eastern Caribbean states, for example, have very recently been reconsidering the pros and cons of political union. Anguilla, though admittedly an extreme case, has already participated in the short-lived Federation of the West Indies, formed a troika with St. Kitts and Nevis, and removed itself from that arrangement to return to the status of colony.

But for probably the greater number of small countries whose immediate future in terms of political status is not so uncertain, as well as for those whose status is, the type of relationships they attempt to foster with neighbouring countries or foreign powers further a field can pose equally acute dilemmas with, of course, similarly serious ramifications for the provision of education.

Crudely presented, the kind of dilemma alluded to may come down to whether a policy of tighter regional unity should be adopted or one of increased international diversification of interests, the future of regional educational initiatives and co-operation being especially put in the balance where this kind of dilemma is to the fore.

National dichotomy, where it exists, as has already been noted, can create dilemmas and tensions in respect of the orientation of educational provision. Is it fitting, for example, that curricula should be outward looking or is a greater degree of introspection more appropriate? Consequently, what are the implications for the orientation and origin of curriculum materials, in that they might more appropriately be 'metropolitan', 'regional', or 'local' in essence? One can contend that not only this last mentioned issue but all of the above dilemmas potentially have a crucial bearing on the provision of education. Such a conclusion is extremely well encapsulated by Packer's (1984) identification of the increased significance for small countries of educational developments at the interface of national, regional and international frames of reference and which often manifests itself in the search for an acceptable balance between the development of a homegrown national education system, formal and non-formal financial support and services provided by other countries, bilaterally or through regional co-operation Packer (1984).

14. Education trends in small states

Packer (1984) has also drawn attention to five trends in the educational development of small states. The first of these he lists as post-secondary institutional expansion: the "observable trends in a number of small countries towards the consolidation and strengthening of formal post-secondary institutions."

He also notes that: "in particular, there is a trend towards the establishment of colleges of further education which incorporate technical institutes and other bodies offering general post-secondary education."

A tendency, according to Packer, concerns the regionalisation of technical and vocational education. He points to the strong emphasis which is placed on these areas of provision and what he sees as evidence of increased co-ordination in respect of them. He notes, too, a growing recognition of a need for institutions making such offerings to play a broader developmental role in the small communities they serve; increase their flexibility and responsiveness; and to reflect and cater for, in the training they provide, the polyvalency which, it has already been noted, tends to be an important feature throughout small country systems, educational and economic.

A third trend remarked on by Packer (Chapter IX) is perhaps only characteristic of the small territories forming two major groups, in the Caribbean and the South Pacific, and concerns the consolidation (in the case of the Caribbean) and moves towards regional examinations at secondary level (in the case of the South Pacific). The two remaining trends Packer singles out are the growth in small countries of non-formal or continuing education initiatives and the increased attention being paid to the possibilities of high technology and distance education. Unlike developments in regional examining, it is the South Pacific region which tends to have the lead in this last mentioned sphere of activity [see also Jenkins (Chapter VI); Teasdale (Chapter VIII)].

To compliment the above interpretation, it is worth noting briefly that Udagama (1987) has recently cited a South Pacific educator, Baba, as suggesting: "that micro-states seem to go through common stages of development and face common issues."

Interestingly, the five Pacific region trends discussed by Baba, which Udagama goes on to list, perhaps share a closer correspondence to those that attracted the attention of Packer than may at first seem apparent. The five are:

(1) The localisation of curricula and examinations;
(2) upgrading the quality of teachers;
(3) providing greater access to basic education, especially at the primary level;
(4) the provision of more appropriate agro-technical education;
(5) development of tertiary education within the South Pacific.

Added to the above observations might usefully be included a further pattern remarked upon by Miller (1987) and made in the context of the small countries of the Caribbean, in which would withstand wider generalization namely that:

> **"the region as a whole has moved away from a situation in which locals occupied subordinate positions while expatriates occupied the top positions. Over the last thirty years the Caribbean has developed a cadre of suitably trained nationals that currently man all levels of the education system. This is true of all the leadership positions, in schools, as well as in ministries of education."**

15. Small country strategies

Finally, then what might small countries best do to make most of their limitations and possibilities? Much of what might be suggested would depend on the stand taken in respect of some of the issues identified in earlier discussion, particularly the dilemma of closer regional unity or increased international diversification. But there may be some recommendations potentially less contentious. For example, in earlier discussion, and perhaps now worthy of reiteration, it has been suggested that a key educational characteristic of smallness is the difficulty of meeting tertiary education needs from within.

A case has been argued that conventional tertiary education institutional models, even in the reduced marginality of a larger country situation, far from represent a panacea. The argument was taken a stage further to suggest that small countries which have not committed themselves too greatly to tertiary educational development along conventional lines may have increased scope to avail themselves of more radical possibilities. Packer's (1989b) observations, among those of others, suggest that to some extent this possibility is already being heeded.

A second point that would seem to stand out from earlier discussion is the significance for small countries of polyvalency and the need for suitable training models to reflect this. Encouragingly, there is again evidence of a growing recognition of such a need. Thirdly, it would seem to make sense that specialization should be avoided as long as possible. This recommendation takes into account both the implications of polyvalency and the increased strain early specialization can put on the system as a whole.

16. Conclusion

Problems caused by diseconomies of scale have been well noted and so, too, have the margins of error which small countries can afford to tolerate. Since it has also been suggested that flexibility of approach in certain circumstances can also create economies of scale, there would seem to be additional lessons. Perhaps the most obvious and, with vision, easily accomplished possibility is to begin to make inroads into the avoidance of unnecessary compartmentalisation and duplication of effort and resources. It may not, for example, in the small country context, make most sense to think of secondary schools, tertiary colleges, community centres, public libraries, college libraries, and so on as separate entities requiring separate plant. Similarly, there is considerable potential for 'education' *per se* not to be so compartmentalised: both in the way it is perceived and in terms of departmental and ministerial organisations. There is considerable potential for overlap through, for instance, the joint use of resources and by the pooling of expertise. Obvious areas include tourism (where this is a mainstay of the economy), national parks, and health and community welfare. Small countries with they characteristically macro-ministries (with micro-departments!), and tendency towards polyvalency, in an organisational sense at least, might fortuitously already be part way down the 'right' path. Unfortunately, to capitalize fully on such possibilities much still needs to be done to combat vested interests and other remaining perceptual barriers and compartmentalised attitudes which can so readily constrain rationalisation and imaginative innovation.

Chapter III

Smallness of scale: obstacle or opportunity? Reframing the issue of scale

by Juliet Chiew

1. Introduction

Given a global context of increased uncertainty brought about by a diversity of stress on many fronts simultaneously and rapid changes in technological developments, education as an investment in people is seen as a major concern for small nations. Against such a context, smallness of scale may not be such a limitation as tends to be assumed by the 'economies of scale' arguments against smallness. Smallness of scale amongst nations, rather than being perceived as an obstacle in development may benefit from changing the perception to one of opportunity. This chapter seeks to balance the view of smallness as an inherent liability, by reframing the issue of scale as one of opportunity, especially in the face of a world characterized by rapid changes, uncertainty and unpredictability. The aim of this chapter is to contribute an initial step redirecting prevalent thinking away from a problem- orientation one towards one of opportunity.

Since 'economies of scale' imply that the bigger the better, and since power is associated with bigness, the prevalent view tends towards bigness as an advantage, and smallness as a disadvantage. While many of the problems and limitations posed by smallness discussed by writers in this nascent field of inquiry should not be ignored, overemphasis on smallness as a problem could eclipse some creative thinking which might have otherwise been employed had the orientation been more on searching for exploitable assets of smallness rather than trying to convert smallness into larger scale units, or simply decrying smallness as an inherent loss. This seems especially true when looking for ways to deal with planning and managing human resources in small nation societies.

This chapter seeks to balance the view of smallness as an inherent liability, by reframing the issue of scale as one of opportunity, especially in the face of a world characterized by rapid changes, uncertainty and unpredictability. The aim is to contribute an initial step to redirecting prevalent thinking away from a problem orientation towards one of opportunity. Specifically, the chapter argues the proposition that smallness of scale offers the opportunity to optimize the twin assets of flexibility and creativity.

2. *Smallness of scale as an obstacle*

The notion of smallness, as an important factor in planning for the economic and social wellbeing of nations, first came into prominence in the late 1950s Hein (1985); Shand (1980). The term 'micro-state,' coined initially to denote the smallest states in Europe such as Andorra, Liechtenstein, Monaco and Switzerland, referred specifically to a minimum scale at which a nation could profit from an economy of scale in production and hence, compete in the world of industrial production. The concept is akin to that of 'critical mass'.

The birth of the concept of micro-states stemming from an economic preoccupation with scale, therefore, has tended to bias subsequent studies on micro-states against smallness of scale as an inherently limiting and disadvantageous. Consequently, emphasis on the diseconomies of scale and questions of economic viability have figured prominently in the discussion of micro-states Dommen; Hein (1985); Selwyn (1978); Shaw (1982); UNCTAD IV (1983). Recent studies on the provision and management of human resources in small nation states have also proceeded from this perspective Bray; Fergus (1986); Brock; Smawfield (1988). Although attempts are made to balance the discussion of scale with the advantages of being small, the disadvantages are seen ultimately to outweigh any beneficial considerations of smallness.

The analysis in micro-state studies has focused on isolating the features of smallness of scale which pose an obstacle to the development and viability of the micro-state as an independent nation among larger, more powerful nations. In general, the features inherent in smallness of scale perceived to contribute to the vulnerability of micro-states may be grouped in three broad categories. The first includes the limited scale of resources, both in terms of natural, exploitable resources and human resources. The second deals with problems associated with the highly personalized environment of decision-making. The third deals with the micro-state's vulnerability to external forces beyond its government's control. If smallness of scale is identified as the problem, what then is the solution? The solutions tentatively recommended in the literature tend toward aggregation of numbers to achieve some economy of scale. Regional collaboration, for example, has been a suggested solution to offset the disadvantages of smallness, so that services, which on an individual national basis would be prohibitive, can still be offered. Though perhaps sensible and even desirable from an economic and geopolitical point of view, regional collaboration has been fraught with political problems. With respect to the second category, the context of familiarity among decision-makers, which is perceived to hinder decision-making based on universalistic criteria, no solutions are forthcoming in the literature except for the suggestion of enlisting the assistance of expatriates for the sake of neutrality. Yet, this solution, too, is fraught with political problems. Solutions to the third category, the problem of vulnerability, have yet to be addressed in the literature.

The implied benefits of 'bigness' of scale would seem to be the relative advantages of (1) economies of scale; (2) impersonal/objective decisions based on non-particularistic criteria due to larger bureaucratic arrangements; and (3) robustness of the system to externally introduced shocks. These benefits, however, reveal a bias towards large structures and organizational forms which assumes that 'bigger is better', 'bigger is cheaper', and 'bigger is greater'. The sense of invulnerability attached to largeness, however, may be less so if we consider that the nature of the contemporary world is so interdependent and interconnected that change in one part of the system affects the rest of the system Forrester (1975).

Framing the problem of smallness as lacking the imputed beneficial features of bigness tends to lock us into a plane of perception that leads to conceptual and operational paralysis. Reframing the issue of smallness, instead as one of opportunity, may lead us to a different plane of perception which may open up new and fruitful directions of thought, energy and, perhaps, endeavour. In times characterized by sudden and unexpected change such as the contemporary era, smallness of scale may very well offer the type of opportunities to manoeuvre and respond to changes with which larger scale systems may have more difficulty.

3. *Smallness of scale as opportunity*

The eighties may well have ushered in an era of increased attention to the elements of change, turbulence and uncertainty of the future with respect to the planning of all dimensions of human affairs. Recent writings indicate that features of uncertainty and unpredictability inherent in planning for the future can no longer be ignored Gleick (1987); Morgan (1988); Toye (1987); Weiler (1988).

Multiple uncertainties concerning future developments on a global scale have been signalled on several fronts: geopolitical, monetary, energy, technological, economic, social, and environmental Godet; Barre (1988). All of these have major implications for how systems, small and large alike, organize and plan for the future Morgan (1988). These uncertainties have been described as stemming from a constellation of crisis points worldwide manifested by rapid changes in: (1) the international economic political situation; (2) many traditional sectors of industry and agriculture; (3) the rapacious exploitation of the environmental system; and (4) the breakdown of social systems Morgan (1988). In a world as interconnected and interdependent as today's, no one single country can be said to be immune from the effects of these global pressures.

In the arena of education, too, major problems of crisis proportions have been noted. These include: (1) budgetary challenges of how to respond to the great social demand for education in a context of restricted expenditure; (2) international challenges of how to adapt to the new technico-economic international context; (3) technical challenges of how new information technologies should be integrated into the education process and why; and (4) socio-cultural challenges of how to deal with a growing cultural heterogeneity and the breakdown of family structures. No country can present itself as a model for others to follow, since education systems the world over in Europe, Japan, Russia, South Korea and the USA are re-adapting and searching for their own ways of dealing with these complex problems Godet (1988).

Against this dynamic context of turbulence, change and uncertainty, smaller systems are currently argued to stand a better chance of coping with and surviving rapid changes in the environment than large systems Morgan (1988). Smaller systems, because of the potential absence or at least reduced level of bureaucratic constrictions imposed by the typical proliferation of rules and regulations may be better equipped to innovate in response to changing environments. Since the entire micro-state society tends to be immediately, if not directly, affected by changes in the environment, the entire community is alert and sensitized. This fact alone may be the critical tension for generating a diversity of creative internal responses to a context of dynamic change. Since the global context can no longer be fruitfully perceived as a system in stable equilibrium, tending to some global homeostasis, it seems more than timely to heed this old adage: "opportunity comes with change, and change creates the opportunity to do the right things." Morgan (1988).

Given this context of global changes and uncertainty of the future and given the constraints of a small scale nation, the opportunity is created for the search for and optimization of two crucial ideas: flexibility and creativity. The underlying assumption here is that small scale, creativity, and flexibility are correlated Morgan (1988).

4. *Flexibility*

Flexibility may be loosely defined as the ability to adapt to environmental conditions Koestler (1964). Smallness of scale offers the opportunity to exercise flexibility not as a luxury, but as a necessity. The constraints imposed by limited resources, the sensitivity to external influences, and the uncertainties engendered by a dynamic global context converge to demand a disposition for flexibility. New situations will constantly present themselves. These conditions will require that the micro-state society recognise and respond to change. Changes as they appear on the future's horizon will need to be dealt with, not resisted.

It seems that the smaller the organizational scale of human resources, the more predisposed it may be to exercising flexibility. Studies, for example, have indicated that the larger the organizational scale, the greater its bureaucratic tendencies and the more the inclination for formal surveillance, formal rules and regulations and narrow job descriptions Rothman (1974). Smaller organizations with their potential for less bureaucratization and more informal, direct, and personal supervision may present a type of structure that encourages, if not necessitates, flexibility. In smaller organizations people are required to exercise discretion, take initiative, and assume greater responsibility for their own organization and management, whereas in a large organization, blame and responsibility can always be shifted elsewhere, or buried in the anonymity of committees.

Studies have also shown that smaller scale settings tend to be associated with indicators of quality of job performance in rendering individualized professional services. Small organizations that operate in smaller communities may be more oriented towards the needs of the clientele than those in larger communities located at a considerable distance from their clientele. In larger systems, large premiums are paid for personalized professional services, individual attention is regarded as a rarity, gimmicks abound to reproduce an atmosphere of 'intimacy and care' associated with smallness, and people are made to feel like numbers in a row. Small systems have the advantages of human contact that large systems have lost.

5. *Creativity*

The sensitivity of small systems to external forces and the resulting vulnerability sets up a dynamic environment which tends to be far from equilibrium or complacency. Equilibrium here is a temporal concept which refers to a situation relatively free from major changes. In other words, the *status quo* remains relatively undisturbed even in the face of changes in the environment. Because small systems are in a far-from-equilibrium situation, i.e. where change in the environment forces the system to change, they are almost in an ideal situation requiring the generation of creative ideas for sheer survival. Thus, the second key idea that requires serious consideration in the discussion of smallness of scale is the need for creativity. Creativity has been defined as resulting from the dynamic tension between two completely different frames of references, which when linked through a seemingly unrelated event, produces a creative act or completely novel thought or idea. On a more practical level, creativity or a creative idea has been defined as that which is 'always logical in hindsight' De Bono (1988). In other words, a creative idea is defined as practical and not necessarily 'exotic' or 'pie in the sky'.

It seems that there is an organizational pattern that is conducive to and supportive of creativity and innovative thinking. Such an organizational pattern is anything but large and hierarchical in nature, since this tends to breed conservatism, adherence to rules and regulations, and tends to stifle debate Morgan (1988). A smaller organizational scale, with the potential for a less hierarchical organizational structure, is seen to provide a context more conducive to the facilitation of creativity and the management of innovation Morgan (1988).

6. Planning and management of human resources: some implications

Against a context of change and uncertainty, the exercise of flexibility and creativity will be one of blowing with the winds unless done with a clear sense of general direction or purpose. With a defined purpose or general direction comes a sense of priorities enabling the formulation of choices and decisions. Within a framework of purpose or direction it may be easier to recognise and take advantage of opportunities. It is interesting to note that in these times categorized by increased awareness of a web of interrelated global stresses, investment in human capital is once more seen as the answer to complex and intractable problems Newton (1990). This time round, however, the emphasis is seen as shifting from the 'capital' in human capital to the 'human' Toye (1987).

As practitioners and academics concerned with both the practical and theoretical aspects of the planning and management of human resources in small nation states, it seems that now, more than ever, it behoves us well to deal with the question of purpose. It becomes critical to ask, as does Newton (1990): 'Education for what?' For consumerism? For fitting into a job? For critical living? For participation in life? For thinking? Literacy? Numeracy? Global awareness? Constructing, negotiating, and formulating answers to the question of 'education for what?' should provide that reference point, that over-arching sense of direction towards which many routes can later be specified. For without direction, how does one decide on the specific route? So in dealing with this question, we cannot avoid asking what is of value? What is important?

In the planning and management of human resources, it is important to develop a sense of long-term direction which short-term disturbances will not dislocate. This framework of answers should provide the guiding force with which to respond to issues of the time without losing sight of the long-term goals. In the absence of such a philosophical framework of principles or values, it seems that the planning and management of human resources may fall victim to whatever planning whim or fad of the times. In the face of rapid changes worldwide, small nations like others must invest in their people. As McDonald (1989), the Guyanese novelist, recently put it:

> **"Education must become top priority. Our schools must become our best and brightest buildings, our teachers must be infinitely better paid and placed among our elite."**

For small nations, the importance of building self-confidence and self-esteem should become a prime consideration in education:

> **"...the only chance a small country has is to develop in its people boldness, self-confidence, and the willingness to innovate and take initiatives ... so that we are able to hold our own in this rough and tumble world."**

In a similar vein, Newton (1990) concurs that education should prepare students to "meet and deal with change, to be flexible, to think, to analyse and challenge the world around them."[1]

Given the sketched context of smallness and its opportunities for flexibility and creativity, what are the implications for the planning and management of human resources in a small nation state? One implication would seem the facilitation of participation by the entire small nation community. Given the assumption that a smaller population has a smaller number of contending stakeholders, participation in the planning process for human resource development may be more realizable than rhetorical.

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[1] An education which is geared to developing skills of flexibility and creativity will necessarily be one that develops self-confidence in its people.

Three questions regarding participation must be asked, however. (i) Participation for what? (ii) how? and (iii) at what levels? The first question addresses the purpose and product of participation while the last two deal with the process. Though participation in a small system may be theoretically easier in capturing the involvement of the whole community, this cannot be done without a managerial strategy and an understanding of the purpose of participation.

If any plan is to be effective, it must be endorsed by all stakeholders involved. To avoid following the path of shelved plans, conceived in an ivory planning tower, it is important to 'cast a broad net' early on in the planning process in order to include as many groups from society as possible and hence, a variety of points of view and ideas. This may at the outset appear overly time-consuming and conflict courting, but engaging in negotiation early on in the planning process may in the end save a plan from being resisted by the very group's ignored earlier. Embracing variety at the front-end in the form of wide participation allows a forum for key issues, concerns and tensions to arise which may be considered, dealt with and addressed before any final decisions are made. The product of this participatory planning process would be a workable product or plan that has a greater chance for endorsement and ownership than if otherwise conceived in isolation from the rest of the community. This is potentially more easily achieved in the small society than in the big one. The principle behind this deliberate creation of tension through the incorporation of as many different groups or individuals as possible is known in cybernetics as 'the law of requisite variety'. This law states that for:

> "any system to adapt to its external environment, its internal controls must incorporate the variety found in that environment. If one reduces the variety inside, the system is unable to cope with the variety outside." *Morgan, 1988.*

In other words, if variety or diversity of opinion or ideas are filtered out of the planning process because of the perceived disruption to the flow of progress, resulting plans may very soon meet with resistance in the face of reality. To handle this process of diversity, of course, would require creative management skills in negotiation, consensus-building, and conflict-management, as well as a 'philosophy that encourages people to deal with issues rather than bury them'. Besides the traditional training in the manipulation of data, planners and managers of human resources may, therefore, very well benefit from creative thinking skills as well as competencies in relationship-oriented approaches to management based on co-operation and respect for others in an environment of equals.

The second question regarding the idea of participation refers to how the process of participation is to proceed and at what level. To go into this in any detail is beyond the scope of this chapter. Suffice it to say that this process is not intended to be a 'free for all' nor 'a one for all' single event. Based on the study of what makes innovations successful, an incremental approach to participation has been recommended which would divide the process into increments or segments in order to provide both feedback and a learning experience.

The process can be segmented into participation by a series of fora involving different groups, e.g. a group of principals by type of school, or teachers by level or subject, or a group of leaders in the business sector, key business representatives, and so on. The goal of such fora would be the identification of issues generated by the context of change with an eye on the long-term perspective. In view of this, changes in shaping action taken in the present need to be considered to prepare for a desirable future. Feedback from each preceding forum helps isolate the major or critical concerns and serves as preparation for the next forum. The planner in such a process acts as a catalyst of ideas, a resource person and manager who ensures that participation is allowed. To do so, it is clear that the educational planner/manager would require skills in how to handle change and in how to help others to prepare and manage change.

7. *Conclusion*

Given that a global context of increased uncertainty brought about by a diversity of stresses on many fronts simultaneously and rapid changes in technological developments, education as an investment in people, is seen as a top concern for small nations. Smallness of scale among nations, rather than being perceived as an obstacle in selfdevelopment, may benefit from changing the perception to one of opportunity. Smallness of scale provides the conditions that necessitate the consideration and the exercise of both flexibility and creativity to provide ideas responsive to the individual micro-state context. Small states are small enough potentially to turn around fast in the face of sudden change and respond with innovative solutions that respond to their environment. Small states may more easily achieve internal consensus. Small states may more easily build 'change teams' and task forces focusing on change. In order to plan and manage for a changing environment where single solutions can no longer be expected to be forthcoming from 'model countries', planners and managers would require a whole different set of skills to embrace change, encourage flexibility and develop creativity as a human resource development strategy.

Chapter IV

Education and development in micro-states

by David Atchoarena

This chapter examines the question of education as it relates to employment and economic growth in micro-states. The results of recent research investigations seem to indicate that many of the problems faced by small Third World territories are those of economic development in general. Nevertheless there is also evidence that small size generates a number of structural characteristics which confer on them a certain degree of specificity Bray (1987); Packer (1989); (1990). Recognition of these specific common features contributes to consideration of small developing countries as a relevant category.

Such a position raises the question of the distinction between large and small countries. As the other chapters indicate, there is no consensus definition of what constitutes a small state. Although it is not necessary to revive here this endless issue, a passing comment is made. Although not fully acceptable the main position consists in considering the size of the population as the criteria for differentiating small states. In this way the *1989 Commonwealth Secretariat Statistical Digest* on small countries considers territories with a population of less than 5 million. Since the interest of this chapter is the smallest states, it will only discuss developing countries with less than 1 million population. This distinction is somewhat arbitrary but it does not conflict with the existence of more structural criteria such as vulnerability and viability George (1985); Crusol et al. (1988).

These two concepts are useful tools to identify and measure the distinctive handicaps and constraints faced by the smallest developing countries, including small island states. (Most of the territories with less than 1 million population are of an insular nature).

The diseconomies of scale, the openness and the specialization of the economy resulting from the small economic size does not necessarily lead to poverty Atchoarena (1988). In fact poverty is not a feature shared by most micro-states. On the other hand extreme dependence on the external environment is a distinguishing feature of very small countries. In this context the definition and implementation of national economic policies and domestic development strategies can be problematic. In most micro-states, services, including tourism and government, play a key role. The size of the economy is in fact an important factor for assessing the possibilities for self-generated growth [Doumenge (1983); Browne; Douglas (1989); West Indian Commission (1992)]. Various studies on micro-states, in the Pacific (the MIRAB[1] economies) or in the Caribbean (the OECS)[2], have identified three major factors in the economies of small developing countries:

- special market arrangements for exports (Lomé Convention, the Caribbean Basin Initiative, the South Pacific Regional Trade and Economic Co-operation Agreement);
- mass emigration as a source of employment and foreign currencies (through remittances);
- aid; concessional aid and grants are the conditions to maintain the long-term viability of small developing countries, including micro-states.

Most of the economic aspects of small nations appear to be unfavourable [Worrell (1987); Atchoarena (1988) (1989) (1990)]. In this context the issue of sustainable development may be an unrealistic prospect. It will be necessary to recognise that the level of living to which the small communities aspire cannot be achieved without massive external financial and economic assistance therefore leading to a low level of political autonomy and sovereignty.

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[1] Migration, Remittances, Aid and Bureaucracy.

[2] Organization of Eastern Caribbean States (Antigua and Barbuda, Dominica, Grenada, Montserrat, Saint Kitts-Nevis, Saint Lucia, Saint Vincent and the Grenadines).

Consequently what role can education play in relation to economic development in small countries? Economic theories as well as historical evidence have highlighted the effects of education on labour productivity, on poverty, and on income distribution. But most of the statistical work concerning these issues has been done in large or medium-size countries, including those in the developing world. Therefore, few data are available on the relationships between education, growth, poverty and inequality in small states.

According to the extremely dependent nature of economic development in very small countries, there is no evidence that investment in education will have a direct and strong impact on growth. The structure of the economy and its evolution can only remain highly correlated to outside decisions and capital. This does not mean that there is no scope for systematic development strategy and policy in small states. Expansion in productivity, equitable distribution of income and increased living conditions require effective planning.

Recent trends in small countries seem to indicate a shift from traditional agricultural activities and light manufacturing to tourism and other services such as financial services (Anguilla, Bahamas, Bahrain, Barbados, Tonga, Vanuatu,...), data processing (Bahamas, Barbados, Grenada, St. Kitts-Nevis,...), 'offshore training' (medical schools in a number of Caribbean islands), and in the future, exploitation of Exclusive Economic Zones (for island countries).

These tendencies point out:

(i) that specialization must be regarded as a dynamic factor;
(ii) that economic flexibility and the capacity to adjust to changing external conditions are key factors for sustained growth in small countries.

This may be precisely the major favourable feature derived from the small size. In fact it seems reasonable to suppose that the smallness of scale facilitates control of space, population and resources and, therefore, enhances the national capacity of mobilization towards flexible manoeuvring and adaptability. Moreover, the free and timely spread of information promotes, to a certain extent, the inflow of new know-how and technologies.

In this respect, the specific and challenging role of education in small systems is to define a suitable mix of general and vocational education in order to stimulate quick adjustments of skill patterns according to labour market and technological changes Bennel; Oxenham (1983); Commonwealth Secretariat (1987).

Another critical issue for education in small states is the preservation and promotion of national culture. The vulnerability to external influences applies particularly to the area of cultural identity. Cultural and information bombardments, through a number of ways, including tourism, television and migration, not only lead to cultural dependence but also affect the very capacity for adopting authentically endo-generated decisions. Our assumption is that education has a very active and crucial role to play in assisting small nations to maintain their distinctive identity. This raises a number of issues including curriculum development, textbook production, examination procedures and institutions, linkages with outside training centres and universities, as the various chapters in this volume reveal.

This chapter focuses on the first aspect; the critical importance of education to economic growth and flexibility. Since the benefits of technical and vocational skills are more directly tied to productivity, the discussion concentrates on Vocational and Technical Education and Training (VET).

1. Coping with smallness of scale: current situation and trends in the provision of vocational education and training

Investment in vocational education and training has been considered by many countries to be one of the key elements of their human resources policies [Commonwealth Secretariat (1983); Commonwealth Secretariat/CARICOM (1988); Chinapah et al. (1989)]. Indeed, it is generally recognised that technical and vocational education and training have strong and positive effects on the first, skills efficiency in the work and then on economic progress.

On the assumption that the development of technical skills would, by itself, stimulate growth, investment in vocational education has often captured an increasing share of education budgets [Bennel; Oxenham (1983); Middleton; Demsky (1989)]. Economic outcomes of this type of policy are of course very poor since training is mainly a supportive investment, a necessary but not sufficient condition for economic development.

In certain cases the result of the uncontrolled growth of technical training has been massive unemployment of vocational graduates. Thus, to a certain extent, the objectives of training policies have become increasingly socially oriented.

A more careful approach consist in adjusting the output of vocational training institutions to the evolution of the labour market, seeking to balance the supply and demand of skilled personnel. Rapid technological changes, new trade patterns, tighter budgets and indebtedness are some of the factors requiring more efficiency in the provision of vocational training.

In most small states, the human resource is the major or the only asset for economic development and competitiveness. Therefore, investment in human capital, including investment through technical and vocational education and training is the cornerstone of national development.

Recognizing the importance of technical and vocational skills, small states have progressively developed their training capacity by introducing technical subjects in secondary curricula as well as through the establishment of technical colleges (e.g.; the Morne Fortune Technical College, St. Lucia; the Tarawa Technical Institute, Kiribati; the Samuel Jackman Prescod Polytechnic, Barbados). An inventory of post-school training facilities in small states of the Commonwealth Caribbean and South Pacific leads to the identification of five major types of institutions, see also Packer (Chapter IX):

(1) National Universities.
(2) Regional Universities (in the South Pacific and the Caribbean) which comprise regional campus as well as extra-mural departments at the national level.
(3) Technical institutes and colleges.

(4) Specialised training centres (nursing, agriculture, hotel industry...).
(5) Multipurpose colleges.

It must be noted that some of these institutions, mainly (3) and (5), do not only offer pre-employment technical training but also provide continuing education, including community-oriented programmes.

Although this is the general path followed by most small countries, each government has adopted a more specific approach according to local conditions. Recent developments taking place in the Eastern Caribbean provide a clearer picture of the structure and trends of vocational and technical education and training in micro-states.

One of the major developments in the provision of secondary education in OECS countries has been the establishment of junior secondary schools which offer pre-vocational education along with general subjects. Furthermore, some secondary schools have been turned into comprehensive schools, providing a wide range of vocational training skills. In this context, vocational curricula concentrate on preparing young adults to enter the labour market at the semi-skilled or skilled level. Comprehensive schools also offer evening specialization courses for adults.

Until recently at the tertiary level, most OECS countries had technical colleges built in the early 1970s to train technicians in various areas, including building, furniture making, automotive, metal work, electricity, electronics, tourism and commerce.

In spite of efforts to improve the skills of the workforce, vocational and technical education and training remained of poor quality in most OECS countries. The reasons for this were mainly:

- poorly qualified teachers;
- inadequate training facilities (equipment and buildings);
- outdated curricula and modes of delivery;
- lack of linkages with the business sector.

The major response to these issues was the establishment of national multipurpose post-secondary colleges Teschner (1992); see also Teasdale (Chapter VIII). The creation of these colleges often resulted from the integration of different existing institutions. These new community colleges offer academic as well as technical and vocational education. It is expected that this system will improve administrative and operational efficiency, including cost efficiency and relevance to employment demand.

These changes have been taking place not only in the Commonwealth Caribbean but also in the South Pacific region. Among the reasons for this was the crisis affecting the regional universities; the University of the West Indies as well as the University of the South Pacific, see Teasdale (Chapter VIII). The withdrawal into national autonomy reflects to a certain extent a setback for regionalism and the integration movement.

At this point, the development of vocational and technical education and training in the OECS, as in most of the micro-states, raises a number of unsolved problems including:

- The role of government: although government has a key role in the provision of vocational training it cannot be solely responsible for this task. Non-government bodies and of course enterprises must also assume an important function. In fact it is suggested by some people that job training should be mainly private as opposed to publicly funded pre-employment training. The debate remains open, nevertheless in small countries and particularly in micro-states, where the small size of most enterprises provides little scope for private alternatives.

- The appropriate mix of regional and national institutions.

- The methods and mechanisms by which vocational training can be more responsive to market forces, and indeed, in certain cases, anticipate the demand for qualified manpower.

- The ways of securing adequate finance. Vocational education and training is always a costly activity due to the equipment required, the low student/teacher ratio and the constant need for change. Developing the institutional capacity for government involvement in skills training, especially at the national level, requires increasingfinancing.

We will now focus on the two last issues; *manpower planning and finance for education.*

2. *Assessing training needs: key issues and perspectives*

The major objective of vocational and technical education and training is to meet the economy's demand for qualified manpower Paul (1989); Zuckerman (1989). External efficiency must contribute to higher labour productivity and economic growth. For policy-makers the question is how to define educational priorities in order to make investment decisions Coombes; Hallak (1987); Mingat; Tan (1988). Two major approaches have inspired the allocation of funds among different levels and types of education for decades: the manpower requirements approach and the cost-benefit analysis.

In the 1960s and the 1970s, the leading approach towards development was long term and planning-oriented (Growth-Oriented Planning), including in the area of human resources (Standard of Living Oriented Planning). In this context, the assessment of training priorities relied mainly on the analysis of manpower requirements. According to this method, the forecast of skilled labour and education needs is based on:

- projections of the output of each sector of the economy;
- composition and structure of the workforce;
- manpower coefficients.

For each type of skill, the manpower coefficient applied to the projected sectoral production provides an estimate of the labour force needs. These results are then translated into educational requirements by establishing links between occupational classifications and the outputs of the education system.

A number of theoretical and practical limitations reduced the scope of the manpower requirements approach, which, led to poor planning in many cases. Apart from the fact that the exercise is based on the quality of output projections, one of the major constraints of this analysis is the assumption of the fixed nature of the manpower coefficients. On this basis, it is not possible to take into consideration changes in productivity or the introduction or extinction of certain types of jobs. Therefore, although valid in a stable environment, long-term manpower forecasting is not compatible with rapid technological innovation and constant economic fluctuations.

The relative failure of the manpower approach has contributed to the increasing use of the human capital theory for investing in education. Within this framework the identification of short-term priorities is based on the evaluation of the rate of return on the investment. An interesting feature of this method is that it considers the costs, which are neglected in the manpower approach. The benefits of education are assessed by measuring wage levels. Comparing the costs of training with the additional earnings associated with education is the principle of the cost-benefit analysis. The foundation of this approach consists of two assumptions:

(i) skilled labour should be reflected in higher wage rates to the recipients of education;
(ii) earnings are a good indicator of labour productivity.

Although the estimated rate of return to the educational investment may, at this time, be the most commonly used indicator of external efficiency (particularly for the funding agencies such as the World Bank), one should consider several caveats before using the cost-benefit analysis.

Many critics point out that contemporary labour markets are far from being perfectly competitive, therefore earnings are a poor estimate of manpower marginal productivity. Others argue that the rate of return approach is dangerous because it excludes social conflicts as well as the externalities produced by education, including its cumulative effects from one generation to the next.

In spite of these criticisms, all of which have some validity, the cost-benefit analysis remains widely accepted as a rational instrument for decision-making in education. The market-oriented nature of the approach as well as the lack of acceptable alternatives both contribute to its success.

Finally it must be noted that both methods neglect the rural and the informal sectors which often absorb the major part of the labour force.

Adjusting the supply of and demand for skilled manpower in small developing countries raises additional problems. Using the manpower requirements approach is even less feasible in an economy that is extremely vulnerable to unpredictable external conditions and factors.

Furthermore, the international classifications of labour do not reflect the peculiar features of occupational structures due to the small size of most enterprises. Reliance on norms can therefore be misleading, because of the tendency to overlook the possibilities for substitution between different types of skills, the sectoral mobility of labour and the multi-functional nature of many jobs (small size reduces the scope for specialization and division of labour).

Another limit to efficient manpower planning in small countries is the fragile link existing between the education system and the local labour market due to extensive migration. 'Educating for export' is in certain cases an open strategy (Kiribati), manpower forecasting then becomes very problematic. One alternative is to attract foreign students, in order to exploit economies of scale in education, although this population will return home, or elsewhere, after graduation (Universities of Brunei Darussalam, Guam, Macau). In this case internal efficiency (cost-effectiveness) is more important than external efficiency (education's contribution to the nation's human capital stock and economic growth).

The smallness of scale also affects the results of the rate of return approach. In micro-states, considering earnings as an estimate of labour productivity becomes very controversial for a number of reasons.

Statistical data indicate that, in small countries, the modern sector of the economy is dominated by the public sector. Therefore, most job opportunities are provided by government and the wage structure prevailing in the civil service tends also to affect the private sector. Government wage levels being partly inherited from colonial administration and highly influenced by unions, especially in the Commonwealth Caribbean, one cannot consider that they faithfully reflect worker-productivity.

Rigidities in small economies are also due to the prevalence of monopolistic structures, monopolies and oligopolies, within the modern sector (international trade and transport, financial services, utilities and, in some cases, manufacturing). It is then reasonable to assume that the total absence of pure market conditions, in many activities, including in the private sector, limits the relevance of the rate of return approach.

The sociology of micro-states is another important factor. The small size of society fosters the multiplicity of roles and the interaction between work, family and politics. In other words, economic decisions, including recruitment strategies, are not only influenced by qualifications, but also take into account kinship and political ties. In this context, the classical model of labour economics appears to be rather unrealistic.

What then are the possibilities of assessing and developing external efficiency in small states?

In the Eastern Caribbean, most countries do not yet have a structured and systematic system for manpower planning. Recognizing the shortcomings affecting vocational and technical education and training, the OECS countries are now developing a manpower planning capacity through a dual approach:

- *Building capacity for planning*

Ministries of Education are establishing National Training Boards to assist in the identification of manpower and training needs. In order to ensure better responses to market forces, the National Training Boards gather participants from both the public and the private sectors, including both employers and workers. The assessment of short-term plans would include the collection and analysis of data concerning the absorption and performance of school leavers and training programme graduates. Such feedback from the labour market should provide useful guidance to educational planners for making the necessary adjustments.

- *Developing information systems*

In order to support their manpower planning activities, OECS countries are establishing labour market and training information systems. This programme would include the collection and processing of various data including, population trends, labour force developments (including, mobility, turnover and migration), wage rates, training capacity and actual output... The efficiency of such a system would also require conducting regular labour market and job analysis studies.

It is still too early to assess the impact of this scheme on educational planning in the sub-region. It is certainly a very positive step, nevertheless, labour market information remains insufficient unless it is connected with data on costs and finance.

Should small states:

(i) Develop national training capacity?
(ii) Rely more on external facilities because the costs of offering training locally is prohibitive?

3. Financing vocational education and training

For three decades (roughly between 1960 and 1980) heavy investments by governments and extensive international financing contributed to significant progress in education. However, the 1980s debt crisis has had a very negative impact on social policies and human welfare, including education.

The economic context of indebtedness imposes decreasing flows of development aid, particularly concessional aid. Moreover, rigorous macro-economic policies, implemented within the framework of structural adjustment programmes, include sharp reductions in public expenditures, decreasing the resources available for the social sectors. The very purpose of long-term adjustment however requires an increase in the quality of human capital, and its immediate effects (growing unemployment due to public sector contraction) generate an additional need for education, through retraining schemes.

It is now recognised that the implications of adjustment policies have been very severe for the poor. The concept of growth-oriented adjustment programme still needs to be clarified and the effects of the so-called multi-sector compensatory measures remain questionable.

Adjustment policies affecting the provision of education mainly consist of:

- reduction or stabilization of staffing, the salaries of teachers and other staff dominate total educational cost;
- cuts in salaries, for the same reason;
- cuts in recurrent and capital expenditures, by reducing operation; and maintenance budgets as well as new investment programmes;
- implementation of cost recovery measures; which in return will affect the poorer beneficiaries who cannot afford to pay for their education.

Until recently, debt has not been a major economic and financial problem for most small countries. Increasing flows of concessional aid and grants, limited access to international private capital markets and large flux of remittances are among the reasons explaining this situation. Therefore, the relatively low level of external debt and debt service is mainly related to a small size effect (high *per capita* aid level due to privileged historical and political ties with donors) rather than the result of a great macro-economic management capacity. In fact, bargaining and negotiating have been in many micro-states a crucial instrument of economic policy.

Nevertheless, the vital need for external financial resources remains a major handicap for small countries. Few micro-states already have debts exceeding their Gross National Product (GNP) (Comoros, Maldives, Sao Tome and Principe, Solomon Islands and Vanuatu). These examples, as well as the vulnerability of concessional aid to external factors and increasing borrowing from the private market militate for a careful monitoring of debt levels in small countries.

In the Eastern Caribbean, as elsewhere, most micro-states have not yet faced severe debt problems. For the 1980-84 period the average Total Debt Service/Exports of Goods and Services ratio was ranging, in the sub-region, from 2.2 per cent (St. Vincent) to 9.8 per cent (Dominica), as compared to 19.2 per cent and 18.1 per cent for Jamaica and Guyana. However, certain countries over-borrowing during recent years may soon lead to serious financial difficulties. In the case of Antigua and Barbuda, increasing borrowing from commercial banks to finance massive capital investments, has severely burdened the economy (the external debt was approaching 80 per cent of GDP in 1987, generating growing service obligations).

Most OECS countries are facing significant difficulties in meeting; the recurrent costs of their public sector, including central government. In fact, these states usually generate deficits on current account. The Overall Fiscal Deficit for 1985 ranged from 1.5 per cent of Gross Domestic Product (GDP) in St. Lucia to 22.5 per cent in Grenada.

Such large deficits are financed from recurrent grant-in-aid from various external sources. On the other hand, governments have to rely entirely on grants and loans to finance all their capital investments.

It must be noted that the education sector absorbs a large share of OECS public resources. For the period 1984-1985, the educational cost, on average, accounted for 18.6 per cent of Governments budgets, or 4.5 per cent of GDP.

In this context it is rather difficult to maintain a viable education system and even more problematic to extend it by developing vocational education and training. Indeed, the costs of vocational and technical education being mainly financed by the Ministries of Education, OECS Governments are now seeking new strategies for supporting this sector.

The establishment of multipurpose post secondary colleges has been, so far, the major reform in view of cost-savings. Combining general and technical education within a single institution reduced both course duplication and total administrative cost. Moreover, these colleges usually benefit from a detached allocation in Governments budgets, allowing more flexibility and initiative to implement alternative financial and teaching strategies.

It is clear that further development of vocational training facilities in the OECS requires additional efforts aimed at cost-savings and cost-recovery.

4. Conclusion

The analysis of the Eastern Caribbean experience in developing Vocational Education and Training (VET) provides guidelines for future policy options in the OECS and more extensively in small countries, including (to a certain extent) non-independent territories:

(i) The expansion of general education is a prerequisite for the implementation of a sound vocational training policy

The quality of primary and secondary education lays the foundation for further education and training. Secondary general education also provides the essential labour market flexibility, and at a smaller cost. In spite of widespread school enrolment, many small states still face a quality problem. Therefore, a careful balance should be maintained between the expansion of general education and the development of Vocational Education and Training.

(ii) Manpower planning provides basic guidance for monitoring the supply of vocational training and assessing investment priorities

Improving the balance between the demand and supply of skilled manpower remains a major objective of vocational training. Considering the limitations of manpower forecasting, it is necessary to develop new information systems providing on a regular basis updated data on labour market trends, including changes affecting occupational structures. Wherever possible, this planning exercise should be conducted at the regional and/or at the sub-regional level in order to achieve the pooling of resources and expertise. This approach is also more consistent with the development of regional training institutions and could be part of the overall integration process (this is particularly the case for the OECS).

Limited expertise remains a major constraint in establishing planning procedures. It seems, however, that regional universities could be more involved in manpower planning, for instance by conducting tracer studies.

Governments' plans should not only care for the manpower requirements of the modern sector. In fact, such a limited attitude would not offer much scope for the development of vocational education. Training policy can actually serve many sectors and purposes, including:

- self-employment within the informal sector;
- training for traditional agriculture;
- promotion of entrepreneurship.

(iii) The increasing finance problem militates for alternative sources of financing

To improve the quality of education and increase student flows would release resources that could then be used to increase the supply of education.

The introduction of user fees is the main cost-recovery measure contemplated by Governments in small states. This measure would also help diversify sources of revenue but on the other hand it could generate an adverse effect on access by students from low income families.

(iv) Uncontrolled investments in vocational training may affect equity

The question of equity refers to the access to education by various social groups in society. In many small states, including the Commonwealth Caribbean, the education system is still very selective, especially at the secondary level, due to the lack of space. Therefore additional allocation of resources to vocational training may delay the democratization of basic education. On the other hand, possible introduction of user fees should be tied to student financial aid programmes (student loans and scholarships).

(v) Access to vocational training by women remains limited

It is recognised that pre-employment vocational training (mainly in commercial and secretarial skills) has increased womens' access to jobs in the modern sector. However, in most small countries the overall participation of women in vocational education and training remains limited. In the Commonwealth Caribbean, a CARICOM (1988) survey of technical and vocational education and training concludes that "females do not have the same degree of access to all subjects areas of the, school curriculum or to all occupations and jobs within the labour market". The reasons for this include social conditioning as well as discrimination within the education system and the labour market. The provision of Vocational Guidance and Career Counselling Services within schools and the setting-up of a system of special incentives, including finance, are among the supporting measures proposed to encourage a greater number of females to participate in vocational training.

(vi) Planned effort must be made to build up training capacity in small states. But how should this be done?

Faced with the development of their training facilities, at the post-secondary level, small states need to find appropriate ways to strengthen local institutions, including through the training-of-trainers. Given the educational background of micro-states – diseconomies of scale, absence of critical mass, limited financial and human resources – (as is firmly documented throughout the book) sub-regional and regional approaches seem to be highly desirable. In this regard, the development of a partnership between similar institutions, multipurpose post-secondary colleges Teschner (1992), and also involving the university, within the same region Teasdale (Chapter VIII), could create a network likely to consolidate each national institution and magnify the overall regional benefit through a multiplying effect. Such an integrated approach to post-secondary technical and vocational education would be expected to:

- be cost-saving;
- facilitate international accreditation, and
- ensure a more flexible response to manpower requirements.

It is true that the definition of an appropriate policy must consider political feasibility, but the shortcomings of regional universities, both in the Caribbean and in the Pacific, should not lead Governments to overlook the need for an increased regional co-operation. This urgency is even stronger in the OECS where political and economic integration is progressing.

Chapter V

Some problems and challenges faced in decentralizing education in small states

by Kazim Bacchus

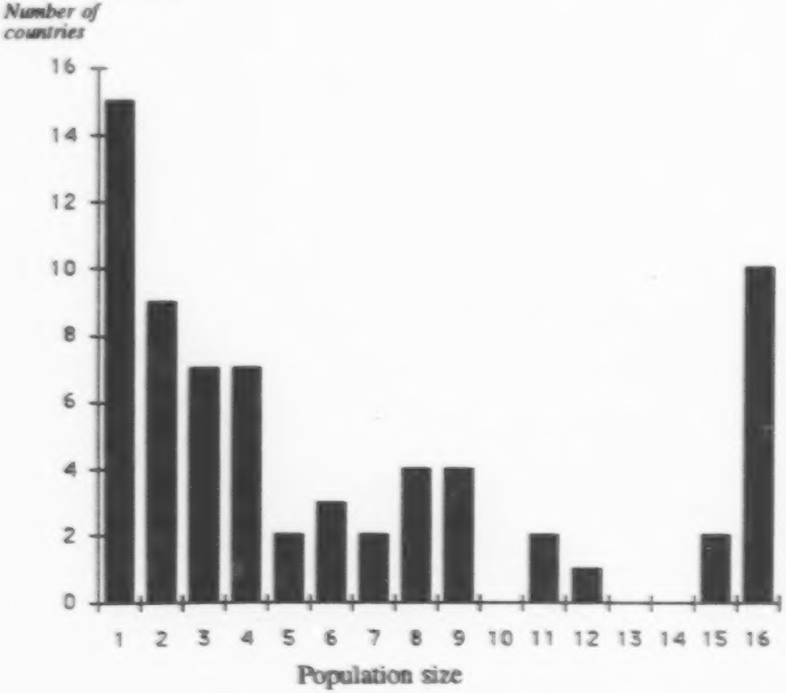
Any discussion of the above topic needs to begin with even a brief exploration of the two main concepts involved i.e. (i) small nation states and (ii) decentralization, because this is likely to throw some light on the reciprocal effects which these two features are likely to have on the administration of any educational system.

1. Size and pressures for decentralization

An important feature of small states is their limited population size and the admittedly arbitrary figure of about one to one and a half million inhabitants is often used when categorizing states as 'small'. But even within this limited population range there are wide variations between small states as ***Figure 1*** illustrates. One outcome of this restricted population size is that most organizations in these countries tend to be small, including their various Government departments.

In addition, there are other features which are likely to influence the degree of decentralization which might be considered most appropriate for their educational systems. One of these is the geographical distribution of their population i.e. whether it is concentrated in a limited area, such as in the smaller West Indian islands like Grenada, scattered over a large expanse of land as in Bophutatswana, Botswana or Greenland) or is distributed in archipelagoes, such as in the Bahamas or the Solomon Islands.

Figure 1. Distribution of 68 small states on the basis of their population



Key: Population size of the 68 countries above

1 = Under 50,000
2 = 50,000 - 100,000
3 = 100,001 - 150,000
4 = 150,001 - 200,000
5 = 200,001 - 250,000
6 = 250,001 - 300,000
7 = 300,001 - 350,000
8 = 350,001 - 400,000
9 = 400,001 - 450,000
10 = 450,001 - 500,000
11 = 500,001 - 550,000
12 = 550,001 - 600,000
13 = 600,001 - 650,000
14 = 650,001 - 700,000
15 = 701,000 - 750,000
16 = Over 750,000

The remoteness of some areas, with small clusters of people living relatively far outside the main population centres adds not only to the cost of providing education but also to the difficulties of administration, especially in a fairly centralized system. The scattered distribution of the population in a small state therefore tends to increase the need for greater flexibility in the administrative process in order, for example, to reduce the amount of irrelevance which nationally devised educational programmes often have for the needs and problems of the more remote areas of these countries. Even the equipment and supplies purchased in bulk by the central authority as a cost-cutting measure can prove unsuitable for schools, especially in those areas where conditions vary considerably from the more urbanized settings, as for example where there is an absence of such amenities as electricity or tapped water.

In such situations also supervisory personnel from a central office find that they have to spend much of their time on such activities as travelling from one remote school to another, instead of using their time giving professional help to the teachers. These problems, therefore, increase the need or even the local pressures for some form of decentralization in the administration of educational services.

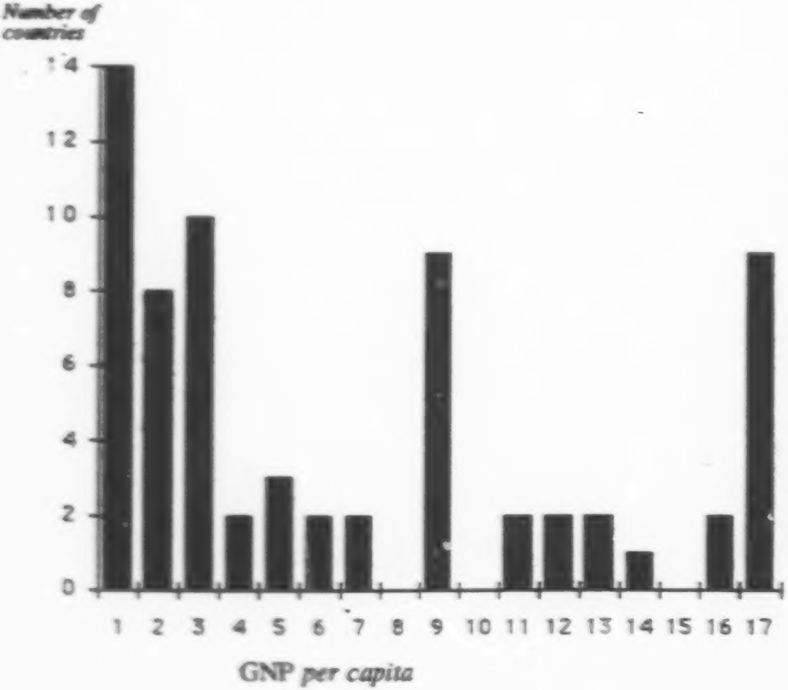
Another factor which must be taken into account in any attempt to decentralize the educational system in small countries is the nature of the inter-personal relationships which characterize these societies. Due to historical or cultural reasons or because of the distance and lack of regular communication between communities these relationships sometimes tend to be fragmented, giving rise to the existence of a number of somewhat distinct sub-groups, sometimes of very limited size, occupying the same small state. While close bonds do exist among members of the same groups these are usually of a 'we versus they' character or a *Gemeinschaft* rather than a *Gessellschaft* type of relationship. In other words, relationships between individuals in such societies tend to be particularistic among members of a sub-group rather than universalistic and this results in local pressures against the development of a highly centralized administrative system. Attention has been drawn to this phenomenon by Farrugia; Attard (1989) and by Riggs' (1964) theory of prismatic societies, though the latter was writing mainly about traditional societies.

This feature of small states often presents difficulties when appointments have to be made, say, of teachers to a local school, or even of senior administrative personnel for a district. When this is done on a universalistic basis the outcomes are usually opposed by some subgroups. Communities often even insist that their teachers be appointed from among local individuals, often irrespective of the fact that they might not be the most qualified persons available. This can prove to be an important source of inter-group conflict. Whilst similar problems do arise in societies with a larger population base, because so few jobs are available in smaller countries and because of the closer knit relations amongst members of the various sub-groups, the allocation of jobs among them can be a matter of great concern. The resulting disappointment among those groups whose members are unable to secure what they consider to be an equitable proportion of the available jobs can increase the demand for decentralization of educational decision-making to local communities.

Another important factor which can influence the decision of a particular small state not to decentralize important areas in education is its limited resource base. Admittedly, as Selwyn (1975) notes there is no necessary association between population size and *per capita* incomes or rate of economic growth. This fact is partly borne out by *Figure 2* which shows the wide variability in the *per capita* GNP among 68 small states. Nevertheless, one finds that there are only very few small states which have achieved fairly high levels of industrialization and overall economic development. For example, of the countries included in *Figure 2* about 47 per cent of them had an income level of less than US$1,500 and of these nearly 44 per cent had a *per capita* GNP of US$500 and less. Their limited population base and these low levels of income have resulted in the financial inability of many of these states to employ highly specialized personnel in particular fields. They, therefore, have to depend on generalists to carry out their various educational activities. This also tends to reduce the desire of a central administration to decentralize its educational decision-making process.

Finally, the development strategy being followed in a particular small state can have an important effect on the degree of centralization of its educational system. Demas (1965) argues that size imposes an important economic constraint on small scale societies due to the fact that their total economic output is likely to be very limited.

Figure 2. Distribution of 68 small states by level of their *per capita* GNP



Key: *per capita* income

1 = US$500 or less
2 = US$501 - US$1,000
3 = US$1,001 - US$1,500
4 = US$1,501 - US$2,000
5 = US$2,001 - US$2,500
6 = US$2,501 - US$3,000
7 = US$3,001 - US$3,500
8 = US$3,501 - US$4,000
9 = US$4,001 - US$4,500
10 = US$4,501 - US$5,000
11 = US$5,001 - US$5,500
12 = US$5,501 - US$6,000
13 = US$6,001 - US$6,500
14 = US$6,501 - US$7,000
15 = US$7,001 - US$7,500
16 = US$7,501 - US$8,000
17 = Over US$8,000

According to him this reduces their ability to foster internally propelled development and create self-sustained economies. Demas, therefore, suggests that, as a consequence, these countries would need to specialize in the production of a very limited number of commodities for export into a few markets. The educational implications of such a development strategy is that only a narrow range of trained personnel will be needed for a limited number of skilled jobs in the one or two industries of these countries. This in turn increases the pressures to centralize educational or training facilities, especially those above the primary level.

The alternative development strategy suggested for these societies by Best (1966) implies that the 'constraints' which they face, are more often 'challenges', which their development efforts must take into consideration. Best, therefore, sees the need for them continually to reassess their potentiality for development by examining how their resources might be exploited more fully in the future. Economic development in this context becomes more an issue of innovative 'management' which attempts to perceive, create and exploit the multiplicity of little openings and opportunities that might become available to the population. Such an approach would seem to indicate the need for a more decentralized system of administration since too much centralization of decision-making can become a serious handicap to the introduction of innovative programmes.

In brief, it seems that if the population in a small nation state is fairly concentrated, if the country is poor and if the development is geared around the production of a limited range of goods and services, these conditions would tend to generate pressures for the development of a more centralized system of administration. On the other hand, if the more creative approach to economic development advocated by Best is to be effectively pursued then there will be need for greater decentralization in the decision-making process. The needed creativity is more likely to come from individuals who, from the type of educational experience to which they have been exposed, have learnt to be resourceful and to use their ingenuity to grapple with what might appear to be familiar problems.

2. *The concept of decentralization*

Having indicated some of the ways by which various features of small nation states can influence the nature of their systems of administration in education, attention will now be focused on the topic of 'decentralization'. Even though the concept is not new there is still little consensus about its meaning. As Bray (1984) indicates, "the first obstacle to analysis of decentralization is that the term is vague, and embraces a multitude of processes and structures". For example, there is a difference in meaning when it is used in political science as against management theory and administration. In the former field it has a long history, possibly dating back to the days of the Greek city states and is often referred to as efforts aimed at ensuring the maintenance of grass-roots democracy. Therefore, opponents of decentralization were concerned about its possible negative effect on the establishment of a strong, cohesive nation state which would be able to defend itself against possible invaders.

In administration, decentralization refers to the extent to which "discretion and authority to make important decisions are delegated by top management to lower levels of executive authority", Simon (1954) the main concern being the effect of this process on the productivity of an organization. Therefore, amongst management theorists, decentralization is essentially seen as an administrative technique which is expected to improve the effectiveness of an organization by ensuring that decisions are made at the point to produce the greatest results. The term is sometimes used interchangeably with the "delegation of authority", a phrase which indicates that decision-making authority is assigned to individuals at a lower level of the organizational hierarchy.

Here, it might also be useful to draw attention to the difference between 'decentralization' and 'decongestion'. The latter often takes place when there is too much concentration of activity in one area and the organization experiences a need to relocate physically some of these activities, usually by setting up branch offices or plants. This can be done without any decentralization of the decision-making process. However, in small states, deconcentration of activities is rarely practised simply to ensure increased efficiency, because existing organizations do not tend to be unmanageable in size.

In examining the issue of decentralization within a Government department one needs to take into account both political and the management considerations. In other words, one must recognise the fact that the key political decision-makers in a centrally organized Government department of a small nation state often express the desire – or even perceive it as an obligation – to be involved in making all important decisions. They sometimes suggest that they want to ensure that these reflect 'the views of the people', as articulated through their elected representatives. On the other hand, when management staff support the idea of decentralization they are usually concerned with increasing the efficiency of the organization and its responsiveness to the clients which it serves.

Therefore, a major constraining factor in the decentralization of decision-making in a department or Ministry of Education, for example, is the fact that the ultimate responsibility for the provision of the service is usually seen as resting in the hands of elected officials. There is often the fear that if decisions were made lower down the administrative hierarchy they might be at variance with the policies formulated at the top. Further, the chief concern of the elected officials is not always the achievement of greater rationality or efficiency of the educational system. Rather, it is usually to satisfy as much as possible, the demands of the population for services and constantly to remind the voters that it is the elected Government which is funding these services. This is one way to help ensure that the political party in power would be returned to office at the next election. These concerns often militate against any serious attempt to decentralize important decision-making responsibilities, even to the senior management staff within the Ministry of Education. This conflicting goal orientation between the elected officials and the appointed administrators often gives rise to friction between these groups over the issue of decentralization.

There is yet another factor in small states which influences the desire of the elected officials to centralize the decision-making process. Because of the limited population in these countries these individuals are frequently approached by members of the public, both formally and informally to raise matters of individual or of policy concern. As a result the Ministers try to keep themselves informed of all important and even lesser important decisions made in the departments under their jurisdiction and this leads to their desire to assume responsibility for making these decisions themselves. This is part of the political reality of a liberal democratic state which cannot be ignored.

Having recognised the importance of the political forces which tend toward centralization, especially in small nation states, an attempt will now be made to look at the issue more from a *management perspective*. Within any organization both centrifugal and centripetal forces are at work in determining the nature of its administrative structure and the challenge is to establish the appropriate balance between these two opposing pressures, in order to ensure that the organization functions as efficiently as it can. However, the decision whether to decentralize or not depends on what organisational tasks are being considered. Further, the process should not be seen as an either/or administrative arrangement, but as necessary and complementary approaches. In fact the management process can be centralized and decentralized at the same time, depending on the type of organizational tasks at hand.

It is obvious that the size of an organization is related positively to the need and the desire to decentralize its activities and, in fact, as Meyer (1972) notes, "one cannot underestimate the impact of size on other characteristics of organizations". As size increases, the organization is likely to become more unmanageable if all decision-making were to remain concentrated at the centre. But, as indicated previously, such expansion is less likely to occur in small states which tend to have organizations of more limited size.

Another factor which often results in additional pressures for decentralization in decision-making is the amount of differentiation or specialization which occurs within an organization. Since specialized tasks often need a degree of expertise which might not be available among current decision-makers in the central administration, the tendency is to allow some of these decisions to be decentralized to newly created specialized units. But here again, job specialization is less likely to occur in small states because of the financial inability of these countries to provide highly specialized services. However, they have moved a long way from the days when the Attorney General of Tobago and the Immigration Agent of St. Vincent each had to double up as the Inspector of Schools for their respective islands. Even when some specialization occurs and increases the pressure for decentralization of decision-making, there will be the corresponding need to co-ordinate or integrate the work of these different specialist sections. This is another instance where the forces for both decentralization and centralization might occur at the same time and there is often the need to accommodate both these tendencies.

In attempting to assess the extent to which an organization is currently decentralized one cannot simply examine the number of decisions made at the centre as against those made at the periphery. Rather, one has to consider how important such decisions are for the achievement of the goals of the organization. Generally, management decisions which are of crucial importance to an organization are less likely to be decentralized than those which are not. This is particularly true in small states partly because of the relative ease with which senior personnel, including the elected officials at the centre can be consulted.

Another factor which influences the need for decentralization is the type of task that has to be performed by the organization.

Let us begin with the policy-making function of a Ministry of Education which is usually the ultimate responsibility of the Minister of Education and the Cabinet. Decentralization of this activity is usually difficult to achieve, especially in small states since, as was indicated above, elected leaders usually want to be seen as responsible for making all policy decisions.

But that does not necessarily mean that such policies must be developed in a top-down manner. Even within a centralized system one mechanism which can be used to achieve some of the benefits of decentralization is to provide for an upward flow of ideas and suggestions into the policy-making process from individuals at lower levels of the organization and even from interested groups in the society. This can be encouraged even though the final decisions will be made at the centre. Such participation can have a positive effect on the introduction of programmes Hage; Aitken (1967) which might be developed to help cope with new realities or changing assessment of existing realities. It might also help to reduce resistance to change Coch; French (1948).

Further, this process recognises that strategic policy decisions are not simply made on the basis of popular support and the need for technical efficiency but are often the result of compromises between the demands of various competing groups. Therefore, participation of the various interest groups in this process of policy-making is important and appropriate opportunities would be more easily made available in a small state for them to do so.

Educational planning and research are two other fields of educational activity in small states which cannot be easily decentralized, especially if these activities are to be undertaken on a cost effective basis. But when the Government is trying to increase community participation in the provision of educational services it could find that decentralization of decision-making in certain key areas such as location of schools and the construction of school buildings can prove helpful in its efforts to secure greater community support for such activities. Nevertheless, a certain amount of central control is necessary, even if it is simply to set standards.

The author wishes to cite *some examples* from his own experiences – one from his role as *head* of educational planning division and in another as *educational planning adviser*, both in small nation states. They illustrate some of the problems posed as a result of *too much* and *too little* decentralization. In one case it was decided to get local communities to assist with the construction of schools. The project which was supported by the World Food Programme required villages to provide labour to build new schools or repair existing ones while the government paid for the cost of materials. All the decisions about the type of buildings that were to be erected and the materials that were to be used were made by the local communities, and the Government had a fixed *per capita* grant that it was providing for each new school place.

Because this was a new venture and the maintenance of school buildings was not traditionally the responsibility of the local communities it was agreed that the central government would, after the buildings were constructed, assist with their maintenance, as it did for all other schools. The project was initially successful in that schools were being built for less than half the Government expenditure when the Public Works Department undertook the task. But, because there were no standards set in terms of the design of the building or the materials used it was soon found that the maintenance costs of some buildings were relatively high and the structure that was erected was not always conducive to the type of atmosphere which would maximize learning outcomes. This indicated that decentralization had gone too far and that there needed to have been some acceptable guidelines about the structure of the school building and the type of materials to be used, especially since the Government was to continue to meet the maintenance costs for these buildings.

In a small archipelagic nation state all decisions about purchasing of supplies for schools were centrally made because of the economies that were to be obtained from bulk purchasing. But it was found that where schools were located in very remote and scattered communities, the equipment shipped to them was sometimes highly inappropriate for their use, as for example when electric cookers were supplied for home economics classes to schools that were located in communities which had no electricity. But these are some of the blunders which is often associated with too much centralization. However, the point is that even though it might be necessary for the educational planning function in small nation states to be centralized this process needs to be attenuated by mechanisms which will allow participation by local communities in matters which affect the local schools.

Another function of the educational system which does not easily lend itself to decentralization, especially in small states, is that of budgeting and financing. Here again such states do present a greater opportunity to permit local inputs into this process, especially in situations where the population is easily accessible or where the central administration is not fully aware of the conditions under which the schools in certain areas operate. This could help prevent such occurrences as that mentioned above where electric cookers were sent to schools where there was no supply of electricity.

To cite another example, the Department of Education of one small state was able to distribute instructional supplies to schools in the more remote areas but because there were no shops in these areas due to the limited population residing there, the teachers were unable to purchase their food supplies locally. But because of its centralized bureaucracy the administration was unable to deal with such exceptional situations.

Another task which has to be performed by the educational system is the recruitment and training of teachers. In small states the decentralization of this process can pose some difficulties. As previously indicated in many of these communities relationships among group members are often very close, sometimes to the point where they result in distrust of outsiders. If the process of hiring staff for schools is decentralized this can make it very difficult for local officials to ignore their personal bonds with other members of their communities and select candidates for positions on a more impersonal basis, depending on their professional qualification and expertise. Therefore, even if it becomes desirable for the recruitment process to be decentralized then the central administration would need to establish certain minimal educational requirements for holders of these positions.

Further, issues like wage bargaining in a small state are likely to be more effectively and efficiently undertaken by a central body rather than by a number of local communities. Decentralization in this area could exacerbate problems related to the different terms and conditions of service for teachers which are likely to emerge in local communities in a small state if decision-making in this area is decentralized. But here again, if wage negotiations are centralized there needs to be some flexibility which will take into consideration the staffing needs of schools and living costs in the more remote areas.

It is in connection with 'production' or execution decisions of a task that the decentralization in education in small states is very important and can be more effectively carried out. This refers mainly to the decentralization of decision-making relating to the teaching/learning process, including the nature of the curriculum content to be offered and the instructional strategies to be used in schools. As indicated earlier, small states, with their limited range of economic opportunities must prepare students to be creative and flexible in their thinking and problem-solving, thereby allowing them to grasp the limited range of opportunities for economic growth and development which might become available in these countries. For this, an educational programme which gives local schools and their teachers maximum flexibility to determine what is to be taught and the method of instruction to be used is important. The following indicates why this is so, especially in small states.

The works of Thompson (1967) and Thompson; Tuden (1959) suggest that, in general, there are two crucial factors to be considered when a decision about task execution is to be made. The *first* is whether there is a general agreement about the objectives or goals associated with the task and the *second* is whether there are known cause/effect relationships. i.e. whether there is clear evidence of what strategies will be most effective in achieving these given goals.

(i) In education there is no marked consensus about goals and schools are usually perceived as having a multiplicity of goals, with no general agreement even in relation to the priority which might be assigned to them. For some individuals raising the level of academic performance in certain subject areas is considered the key purpose of schools while, for others, attitudes and even personality development or ability to cope with a changing world are seen to be their main expected outcomes. Further, it is not the aim of schools to produce identical outputs i.e. children whose actions or views on any subject are the same as a result of the education they have received. In other words, the task which schools face is not homogeneous as is the case when goods are mass produced.

(ii) There is no generally accepted approach about how teachers might achieve any given educational objective. It is known that the same strategy or treatment might not produce the same outcome in all pupils. Part of the problem is that the major elements in the learning process are the pupils who do not comprise a homogeneous input into the school system. They vary considerably and as a result no one approach is effective with all students, even if the objective is seen as raising test scores. Further, any attempt by schools to mould all pupils in the same pattern would normally be regarded as poor educational practice since one of the major aims of schools is to develop to the full, the potentiality of each child. This can obviously best be done if teachers attempt to cater to the varying abilities and interests of their students and individualize their learning experiences in an effort to maximize their learning outputs. In other words, the teaching strategy used in schools must be creative if schools are to produce students with the maximum amount of ingenuity and flexibility in their thinking and their problem solving efforts. ***Figure 3*** indicates the 'ideal types' of tasks which an organization has to perform.

Let us look more closely at the two extreme types of tasks. Those which fall in *Box 'A'* arise from situations in which one usually knows exactly what is to be done because the inputs and expected outputs can be standardized and the means/ends relationships are known. In such a context a system of centralized decision-making would be most appropriate to maximize the quantity and maintain the standardized quality of the output. There is no creativity involved in the process and each product must ideally be identical to any other, irrespective of where it is produced. For example, in making Macdonald's hamburgers there is expected to be little difference in the operations, whether they are performed in London or in Singapore. The various steps involved can often be easily specified in a manual so that they can be consistently followed in order to ensure the same final product.

We need to compare this with the tasks which schools face, including schools in small states. These will fall into *Box 'D'*. Here, as has been suggested above, one is trying to produce students with maximum creativity and innovation so that they develop a flexible enough outlook which would enable them to exploit to the full the little openings and other opportunities which these economies provide for development. In such a situation a process of centralized decision-making which involves the production and compulsory use of a rigid curriculum and which specifies instructional strategies that all teachers must follow would be counter-productive of efforts to produce innovative and creative individuals. In fact, it has been shown that, within the context of schools Cillie (1940) and other educational institutions Blau (1973) decentralization and programme innovation often go hand-in-hand.

Decisions about curriculum content and teaching strategies are, therefore, best made locally and should be undertaken by the schools and the teachers who are closest to the teaching/learning process. This is likely to allow for the development of a vibrancy and flexibility giving the local staff the greatest opportunity, not only to meet the specific needs of their clientele but also, as indicated above, to develop creativity in the students which would be essential for survival in, and the development of, their societies. The point here is that the nature of the task which schools perform and the need for creativity and ingenuity among their students, especially those in small states, makes it necessary for decisions relating to the teaching/learning process to be decentralized or localized to the point that it becomes the responsibility of each school and each teacher.

There are obviously certain constraints in pursuing such a policy in most small states, due largely to their lack of resources in terms of well educated and trained teachers. But the ideal situation to which development efforts should be directed is to decentralize or localize the decision-making process in the field of curriculum implementation and instructional strategies used. This would mean that constant attempts have to be made in these societies to raise the educational levels and professional competence of the teachers. The development of creativity and ingenuity in children could only come from teachers who are professionally well prepared for their jobs.

Figure 3.

IDEAL TYPES of TASKS which Organizations have to Perform		Tasks for Which Expected Outcomes Are	
		Identical and Implementation can be Standardized	Variable and Needing Creativity for Implementation
Tasks for Which Means/Ends Relationships are	Clearly Known	A	C
	Not Clearly Known	B	D

3. Conclusion

In summary the main points made in this chapter are:

(1) There are a number of factors which have to be considered when attempting to determine the need for decentralization of the educational systems in small nation states. In addition to the size of their population one needs to examine how it is distributed, the close knit nature of the social relationships which characterize these societies, their resource base and the development strategies which they might be pursuing.

(2) There is often a conflict between the political and the management objectives of decentralization and both of these have to be taken into account in developing a suitable administrative structure for a Government Department such as a Ministry of Education. This is particularly important in small states where access to elected political leaders tends to be relatively open to the public and Ministers are constantly being approached with questions both about the policies and particular practices of their Department.

(3) The size of the organization and its need for specialists positively influence the pressure for decentralization. But small states, which usually have organizations of limited size and which tend to depend on the service of generalists often find it a less compelling need to decentralize their administration.

(4) There are both centrifugal and centripetal forces at work in any organization exerting pressures for and against decentralization. The need is to develop an appropriate balance between these two opposing pressures to ensure maximum efficiency. In fact the management process can be centralized and decentralized at the same time, depending on the type of organizational tasks at hand.

(5) It is not the number of decisions which are made at lower levels on the organization that provides an index of the degree of decentralization within an organization. It is the importance of these decisions which is the crucial determinant.

(6) There are many functions which an organization such as a Ministry of Education in a small state performs that cannot be easily or economically decentralized. Nevertheless, there are many opportunities in these states for inputs to be had from the various groups in the community in most of these key areas of decision-making. Therefore some of the benefits of decentralization can be more easily realized in such countries, even if the final decisions are ultimately made at the centre.

(7) Finally, one of the most important areas in education in which decentralization of decision-making needs to take place is in the teaching/learning process. Decisions in this area must be the ultimate responsibility of the schools and the teachers, especially in the small states. This is necessary if teachers are to be given the freedom which will allow them to help produce the type of individuals who are creative and are flexible enough in their approaches to problem solving. This would eventually allow the students to maximize their contribution to the development of their countries. But the success of such a step would depend very much on the efforts made to improve the education and training of the teachers.

Part II

Patterns of educational provision

Chapter VI

Distance education for small countries

by Janet Jenkins

Distance education is critically important for small countries with small populations. It offers a means of expanding educational provision to an extent impossible for a small nation if it were to rely instead on conventional methods and resources.

In order to understand this, it is necessary to understand the nature of distance education. Ten years ago people said 'distance education – what's that?' Today, at least in the United Kingdom, they say 'Ah! You mean the Open University'. So let us begin there. No doubt we can all visualise a student of such a university, typically a housewife in her thirties or a non-graduate civil servant in his/her late twenties, at home and sitting in front of a television set with a note pad in the lap. From this picture we can derive some idea of the characteristics of an open university:

> **open, in the kinds of students it recruits. The clients for open learning are those who for whatever reason do not have easy access to conventional education. They may be beyond the standard age, they may not have the normal entry requirements, they may have home or work responsibilities which restrict the time they have available for study.**

An open university is usually also

open, in the type of courses it offers. Mature adults and people in mid-career want a range of options for study different from those available for ordinary undergraduates

and

open, in time and place of study. People can largely study when they like – most study part-time and take several years to complete their degrees – and people can study where they like.

Much, but not all, open learning takes place with learners at a distance from their teachers. In an open university

students study mainly in their own homes. They learn from specially prepared texts, from television, radio, audio-cassettes – an array of media to teach the subject with best effect.

students get help individually from a tutor whom they may seldom see. They submit written assignment from time to time, and the tutor marks and comments on these.

students study alone for most of the time. Occasionally, perhaps once a fortnight, they may attend a study centre where they meet tutors and other students.

The attraction of distance education at university level as a complement to traditional universities is evident. Distance education is also widely used for pre-university or professional studies. But in what conditions can it work?

The argument goes something like this. For over a century people have been studying by correspondence. This is a satisfactory mode of study for some but many are unable to cope with the stringent condition of postal communication alone. Distance education differs from correspondence education in that:

it provides a wider range of teaching strategies, in particular using media such as television and radio where possible to complement or supplement print.

it provides face-to-face interaction with tutors and peers on an occasional basis to complement correspondence tuition.

All this improves performance. Figures are hard to come by, but a rough indication is that about half the students of some open universities complete their degrees – acceptable figures for part-time students, whether in the distance or conventional mode - while correspondence institutions may achieve completion rates of 25 per cent or even less.

But distance education works at a cost. It is normally assumed to be 'cheap', that is, it costs less per student than conventional education. This is often, but not inevitably, the case. The development of high quality materials in a variety of media demands a high initial investment. There are then the costs of providing tuition and counselling both at a distance and in study centres. If a course attracts large numbers of students, then the costs of materials are shared and the cost per student usually drops below the cost of providing similar education by conventional means. This suggests that distance education is most suitable for mass education. If it is used for small numbers, the consequences are:

high unit costs. The development costs have to be spread over a small number of students. Text development may use most of the course budget, resulting in media atrophy. The audience is too small for broadcasting; the costs are too high, and the system reverts to pure correspondence study.

and

less face-to-face support. The few students may live far from each other, with a handful near each centre of population. The institution may not be able to afford to provide tutors for study centres which serve only a handful of students, and may not be able to identify places that can be used as study centres within reach of students' homes.

Thus, on a small scale, distance education has high unit costs and may be of poorer quality than if it serves larger numbers. We have apparently established that distance education is suited to large systems in countries with large populations. Let us see if we can prove otherwise.

1. Lesotho Distance Teaching Centre (LDTC)

We start in southern Africa. In its early days in the 1970s the International Extension College was asked to help Botswana, Lesotho and Mauritius, to develop national distance education institutions. Let us consider what happened in Lesotho.

Lesotho is a small country, a little over 30,000 square kilometres in area. Entirely surrounded by South Africa, it is mountainous, with its lowest point 1,500 metres above sea level and rising to 3,000 metres. In the early 1970s when the Lesotho Distance Teaching Centre was established, the population was about 1.2 million. The people all speak one language, Sesotho, with English used in secondary schools. The main occupation is subsistence farming, with agriculture in the southern lowlands and pastoral farming in the western mountains. At the time, about 25,000 people were in paid employment in Lesotho, while about half the adult male labour force worked in South Africa.

In education, the two major problems were the quality of primary education and access to secondary education. By the mid-1970s primary education was already available to all, but schools were overcrowded, classes often had over 100 pupils, and many teachers were underqualified or unqualified. Only about a quarter of the children who started primary school completed all seven standards, and only about a third of these entered secondary school. By 1979 there were only 60 secondary schools with 16,000 students and 600 teachers.

In 1973 the Chairman of IEC, Michael Young, visited Lesotho. The Ministry of Education was concerned about growing numbers of children and adults who were studying secondary courses privately with expensive foreign correspondence colleges. Michael Young and the Permanent Secretary for Education drew up a plan for a distance teaching institution. The Lesotho Distance Teaching Centre was established in 1974. The two planners:

> "identified two groups of people that it should help: private candidates studying for examinations outside schools and rural people. They also decided on teaching methods. The new centre was to use distance teaching, combining printed materials, broadcasts and face-to-face teaching." *Murphy, 1981.*

In its first five years the Centre launched an ambitious programme. A project for rural adults aimed to help improve the quality of life. After initial research, the Centre developed a series of self-instructional booklets on practical topics. Booklets were chosen because of the high level of literacy. The first were on cookery, first aid and crochet. They were used in groups and by individuals. Evaluation showed both methods to be effective, and several further booklets were developed.

Another project was literacy and numeracy for herdboys, young people whose duties prevented them from attending school. The Centre developed workbooks and games which could be used in groups with the help of a trained leader. The project took several years to develop and eventually received the recognition of an international award.

On the formal side, the LDTC developed courses for Junior Certificate (normally taken after three years of secondary school) and 'O' level (taken after 5 years). By 1979 the Centre had produced six courses at Junior Certificate and four at 'O' level. Each course consisted of correspondence materials with a series of radio programmes. More than 700 students enrolled between 1975 and 1979, including 360 teachers. The latter enrolled as part of an in-service training programme offered for underqualified teachers by the (then) newly established National Teacher Training College.

Five years after the LDTC started Paud Murphy, who was its Director through most of that period, wrote:

> "I believe that the centre has made a significant contribution to bringing together education in schools and that provided outside schools. A distance teaching institution fits comfortably into both systems of education. Ministries of Education view the correspondence courses with approval and later begin to appreciate the rest. Other Ministries and organisations providing education out of school welcome help with their work and gradually come to appreciate the educational expertise. Education in schools can be sterile unless the curriculum, examples and methods are relevant to pupils' lives. Education out of school is often directly functional, but amateurish in its methods. the provision of education on health, agriculture and family life needs careful planning and focused methods." *Murphy, 1981.*

The vision of the potential of distance education to draw together education in and out of school was a powerful one, and hopes of success were perhaps not totally unrealistic in a small, compact country. What actually happened? A recent report Curran; Murphy (1989) has looked again at secondary level education at a distance in Lesotho and five other African countries, in the context of a study for the World Bank of distance education at secondary level. The study aimed to discover whether distance education had widened access to secondary level education in Africa. If so, has it been cost-effective and educationally effective?

In Lesotho, the answer to all these questions was negative. Since 1980, conventional secondary education in Lesotho has expanded considerably, although it is still not available to all. The LDTC continues to offer secondary level courses, but still caters for small numbers. The current report notes 500 new enrolments. It looks in detail at performance on courses for adults in four of the six countries, and concludes that:

> "On the evidence available ... establishment or continuation of these programmes must be justified on grounds other than success in examinations." *Curran; Murphy, 1989.*

A cohort analysis in two of the four countries shows that fewer than 5 per cent sat for examinations after 5 years of study, and up to

75 per cent had stopped studying completely by then. In Lesotho itself, candidates taking the JC examination achieve results no better than those of private candidates as a whole, many of whom study without any support. The low recurrent costs of the courses is little compensation.

In contrast, the same courses, or adaptations, have been used since 1978 to provide in-service training for unqualified teachers in Lesotho. Trainees follow correspondence courses, attend an annual four week residential course in teacher education colleges, listen to weekly radio programmes, and conduct supervised lessons. Between 300 and 500 teachers annually study the programme. The graduation rate reported in 1984 was 87 per cent.

Sixteen years after it began, the LDTC still survives. It was designed to have several functions, to meet the needs of a small country. Its results are mixed. The correspondence courses have done little to improve access to education in Lesotho, but have had a substantial indirect effect in that they have helped to train the nation's teachers. The institution as a whole lacks resources, is unable to develop and morale is low. The innovative vision of linking in school and out-of-school education has come to nothing. The idea itself remains one with potential. How could the LDTC better realise its potential? One possible route is through collaboration. The teacher training programme shows the value of inter-institutional collaboration within the country. Could international collaboration bring further benefits? We shall explore this theme in discussing university level distance education.

2. *University of the South Pacific (USP)*

Let us turn first to the University of the South Pacific (USP), see also Teasdale (Chapter VIII). The USP serves 11 countries on many islands, with its main campus in Suva, Fiji. It offers courses in the conventional mode, with students attending on campus, and it also offers some of the same courses by distance education. This system, where the same courses are offered both internally and externally at a distance, is often referred to as dual mode.

The USP was established in 1968 and as early as 1971 decided to introduce an external version of the non-graduate Diploma in Education. Soon after, it began to teach some of the regular undergraduate courses through distance mode. All the distance courses are for credit, and are mostly at foundation and first year level. Students usually complete their studies on campus, in order to benefit from the full choice of courses available. There are, however, several second and third level courses now available. The University aims to allow students to complete a B.Ed. degree entirely at a distance. Currently 160 courses altogether are available through distance mode. Registration in the Extension Services programme has increased by 115 per cent between 1983 and 1989, and now account for 38.6 per cent of the overall enrolment. This is achieved on a modest share of the overall recurrent budget of the university Matthewson (1990).

Courses consist of centrally produced correspondence courses, many with audio tapes or radio programmes. Distance students study at home and also attend local centres. Nine of the eleven countries have regional centres which are used as local study centres. Until 1985 voice-to-voice communication for downloading the radio, for administration and for student tutorials was available via an old American satellite; new satellite communications are now installed. Local support supplements teaching from Fiji. Some countries make their own radio programmes. Local centres also have resident lecturers who provide tuition and counselling.

The USP's Extension Services Programme demonstrates how one distance education system can serve several small countries. Because the University is a single body it is easy to forget that it is a regional, international university. Most individual countries in the Pacific region are too small to sustain a separate university. In the USP they have an international university and, through the Extension Services Programme, each country has a part of it that is locally based, its own. People who cannot easily travel abroad to Fiji, to study, can now study at home. Distance education makes this possible by preparing materials centrally and providing some teaching from the centre through the satellite. Each country can then add its own teaching and counselling. Even if numbers for many courses remain small, how else could these students receive education? The USP's Extension Studies Programme is now facing the consequences of success, with more students than it can comfortably handle seeking admission.

3. The University of the West Indies (UWI)

The University of the West Indies (UWI), another regional university, has more recently entered the field, with its Distance Teaching Experiment (UWIDITE). Nine of the 14 countries in the University use a telecommunications network to teach students located at these sites. Jamaica and Trinidad are linked by INTELSAT satellite, while Antigua, Barbados, Dominica, Grenada, St. Kitts, St. Lucia and St. Vincent are linked by microwave or UHF. Local extra-mural centres are linked to the international gateway on each island by leased four-wire telephone links. Centres are equipped with microphones, speakers, telephones, a switching unit, slow-scan television and a telewriter for on-line use, and audio and video facilities for off-line use. Resident tutors manage the centres, and their responsibilities include the development and maintenance of educational programmes appropriate to each particular country. Over 20 courses are now offered through distance mode. Examples include a specialist Certificate of Education for practising teachers, with six options available, first year undergraduate courses in some subjects, a course for nurses in reproductive health and a nutrition course for community workers.

Prior to the introduction of UWIDITE students had to study on campus, with campuses only in Barbados, Jamaica and Trinidad. People from the 11 other countries served by the university therefore had limited access. UWIDITE enables people to study an increasing variety of subjects in their home country.

The UWI Certificate of Education courses offer further training for practising non-graduate teachers. Studied full-time, the Certificate takes one year. It consists of a common core and one specialism chosen from about a dozen. Taught at a distance, it enables practising teachers from non-campus countries to participate and gain a qualification. The Certificate was first awarded in 1954; the distance version was introduced in 1983, with four specialisms, and already by 1985 Dominica had produced as many certificate holders as in the previous 30 years put together.

Numbers look small. In the first three years 178 students were enrolled from six countries. Costs are less than half those that would have been incurred if the teachers had registered for the courses on campus and had to be replaced in the classroom while they studied. The programme director concludes:

> **"These education courses have been real successes in terms of the numbers graduated, the quality of the students' performances, the interest of the faculty, and the much lower costs of the distance teaching programme."** *Lalor, 1988.*

Distance education is the best means of providing these scattered teachers with training. Some graduate teachers have now chosen to study the Certificate programme in preference to going to Jamaica for full-time study. UWIDITE's great strength is in its provision of specialist courses for upgrading professionals. Its communications system allows several countries to offer the same programmes. The project office in Jamaica acts as the co-ordinating centre for materials production and as the communications centre. Resident tutors in the islands publicise the courses available at a distance, recruit and advise students and also offer conventionally taught non-formal courses, according to local needs. Thus, UWIDITE enlarges the range of courses that the University can offer in non-campus countries.

The regional collaboration in UWIDITE has brought other benefits. Regular discussions between students from different islands leads to a greater sense of connectedness. The governments of the islands feel they have a greater stake in the University. The number of courses offered through UWIDITE continues to grow by popular demand.

4. Advantages of regional collaboration

International collaboration, as we have seen in the USP and the UWI examples, can enhance the benefits of distance education. Even if numbers remain small and costs high, the very fact that education is available and accessible in people's home countries can justify the existence of distance education. But can it be viable in a small country without such collaboration? In the case of Lesotho, we saw that one programme, again teacher training, is successful and to some extent shores up others. But Lesotho, like many other small African countries, suffers from serious economic constraint and without adequate resources its distance teaching centre has been unable to develop and fulfil the promise of the seventies. The potential of the method to promote rural development remains largely unrealised.

Could a greater degree of collaboration help? LDTC made two attempts at collaboration in its early days. First, it brought in a British course for local use. But its director preferred the expensive route of producing its own courses. Murphy (1981) gave four reasons:

(i) the course produced in Britain was giving students problems;

(ii) some of the syllabuses were unique to southern Africa;

(iii) courses produced elsewhere have examples designed for that country;

(iv) adapting a course implies accepting the format and learning design – we had seen few good courses elsewhere .

Today this version of 'not invented here' looks rather cavalier. Most of us have used 'foreign' textbooks in our studies, and many of us have studied in a 'foreign' university, without any apparently harmful effects. Reservations about use of materials from elsewhere are justified, but not wholesale rejection.

A little later, the Lesotho Distance Teaching Centre developed two courses collaboratively, under an agreement with Botswana and Lesotho. Institutions in each country were to develop courses which the others could then use. But even this scheme has not been successful, as today's completion rates show. How can this be explained?

There are two elements of successful collaboration in distance education. One is the exchange and sharing of materials, the other their actual use.

The sharing of materials is vital for small countries. The three collaborative schemes discussed above all depend on inter-country use of materials. If small countries do not have the resources to teach a subject – whether at a distance or by conventional means – then materials prepared elsewhere can do the job.

The case for collaboration is usually supposed to rest largely on the materials themselves and their potential transferability. But what constitutes transferability? 'Examples designed for other countries' may, to some extent, inhibit learning, but the importance of such cultural relevance may often be overrated. Transferability depends not only on what is taught, but also on how it is taught – that is, how the materials are used. A more balanced view suggests that transfer may be easier if adequate attention is given to the local support system. At the University of the West Indies (UWI), for example, the resident tutors arrange tutorials, counselling and library services to support the teaching materials. A good local support service can compensate for any inappropriacy or inadequacy in the materials. The relative ineffectiveness of collaboration at the LDTC could be attributed to the college's lack of resources and consequent skeletal student support system. However, the collaborative model itself remains valid.

5. *Conclusion*

Open Universities gave distance education credibility. But for many countries, particularly smaller ones, different forms of distance education are more suitable. Such distance education systems may share with Open Universities many of the characteristics of open education described earlier, but will have to look at different, less costly, ways of exploiting the resources available. Models of international collaboration, particularly in the provision of course material, deserve careful examination. In Asia there has been some pioneering work with institutions which offer complete distance programmes with no locally produced courses. Hong Kong now has its own Open Learning Institute, a degree granting body, which operates on this model. It creates degree programmes by putting together several courses from institutions in countries including Australia, New Zealand and the United Kingdom. Some adaptation is provided and some additional material is prepared locally. The providing institution gives advice where necessary. The tuition and advisory services are entirely local and greater attention is paid to the quality of student support. The Institute is unique. It has the characteristics of an open institution described earlier, but it explores fully the possibilities of resource sharing through international collaboration.

The establishment of *the Commonwealth of Learning* in November 1988 gave further credibility to the concept of collaboration. The idea came from the Commonwealth Standing Committee on Student Mobility. As it became more and more difficult for students to move around the

Commonwealth to study, it looked attractive to take learning to their homes. Many Commonwealth countries are small, and the picture of mass education using mass media that we began with is inappropriate. But we have seen that in small countries, carefully targeted distance education can cost less than the conventional equivalent, even if numbers remain small. Teaching materials should not generally be locally produced in small countries, apart from a few courses. They can be prepared by a central body serving a region, or be selected from materials available internationally. A sensitively developed local tutorial system can compensate for any inappropriateness and also reduce the sense of isolation that any distance student is likely to experience. The USP, the UWI and the *Hong Kong Open Learning Institute* also demonstrate some of the benefits of international collaboration.

This chapter has argued that distance education holds considerable potential for small states, and that there are additional benefits where countries work together, as the examples of the two regional universities demonstrate. International co-operation is apparently easier where there is regional affinity. The existence of an institutional framework also helps; co-operation between separate institutions in Southern African countries has so far worked less well. The challenge now is to develop on two fronts: *first*, to strengthen existing co-operative schemes, encouraging greater commitment between partners and more active collaboration; *second*, to encourage more collaboration on the wider international stage. We should not underestimate the difficulties of international sharing, and the level of commitment and resources it requires, but we have looked at some of the models of distance education which may make it possible on a wider scale. The long-term aim of the Commonwealth of Learning is that 'any learner anywhere in the Commonwealth shall be able to study any distance-teaching programme available from any *bona fide* college or university in the Commonwealth'. That vision of collaboration is one which could inform the development of distance education in small countries.

Chapter VII

A Himalayan dream: a university for Bhutan?

by Kevin M. Lillis

1. Introduction

Only a limited amount of literature in the bibliography of this book is concerned with higher education within small systems [although see Harrigan (1972); Honneybone (1986); Braithwaite (1965); Friday (1975); Irvine (1978); Bird (1984); Grant; Rudolph (1987); Crocombe; Meleisa (1988) (1989); Sherlock; Nettleford (1990); Baba (1992); Bacchus (1992); Bhindi (1992); Green (1992); Meek (1992); World Bank (1992)]. Equally, none of it provides an analysis of a higher education system within a small nation state.

This chapter profiles the provision of higher education in Bhutan and considers the strategic options available to the country as it seeks to satisfy the quest to establish a system of higher education that adequately reflects its unique national aspirations. Equally, the chapter portrays the constraints that delimit the options available to educational planners. A dominating constraint is the 'smallness syndrome' that has been discussed throughout this book: there are inadequate numbers of students of adequate quality emerging from the deliberately under-expanded school system (particularly in the focal curriculum areas of mathematics and science) to enable cost-effective in-country provision at degree or university levels. One consequence is a degree college whose enrolment profile is distorted by junior college (i.e. high school) intakes. Another consequence is virtually total dependence upon Indian (particularly University of Delhi) models of curricula, examinations and staffing and the consequent distortions and alienations of imported educational cosmologies. Another is an impatience to establish a *bona fide* national institution of higher education – but without the necessary human resources (students and staff, qualitatively and quantitatively) to be able to do so.

This chapter profiles the context in which the institution, Sherubtse College, Kanglung, East Bhutan, is the system. It also gives flavour to the planning dilemmas associated with the evolution of Sherubtse and with national optimism that the College can be the platform for the creation of the National University of Bhutan. This study seeks to illustrate two obvious twin issues confronting small systems when planning higher education (i) the lack of a critical mass of students of sufficient quality to create cost-effective sub-systems; and (ii) the inhibiting consequences upon national creativity of dependency upon external manpower and institutional development. In this, as Packer (1989b), for example, illustrates, Bhutan is not alone, for many small systems share the 'toplessness' that Brock (1984) sees as one of their major characteristics.

This chapter provides only a limited discussion of the wider social and political context of Bhutan. Much of the virility of its unique political economy is, thus, missing. In any case, much of this has yet to be publicly documented, although certain perceptions are available from historical analyses and from key agency reports [Aris (1982); World Bank (1984) (1989); UNDP (1987)]. Six key contextual features, stated briefly to the point of danger, provide a point of entry for the subsequent detailed discussion of higher education.

(1) Bhutan emerged into the 'modern world system' after three centuries of self-imposed isolation only in the late 1950s/early 1960s both in response to China's rape of neighbouring Tibet and in response to internal pressures for degrees of modernisation.

(2) It is a traditional Buddhist monarchy that has undergone none of the agricultural, industrial and social revolutions associated with other modernising nation states.

(3) Much of its recent socio-economic development has been and remains heavily dependent upon India. Small, isolated, mountainous and landlocked, with a land area of 46,500 square kilometres (much of it the high Himalayas and uninhabitable) it is bordered by Tibet, Sikkim, West Bengal, Assam and Arunachal Pradesh. Only 5 per cent of the land is cultivated or inhabited by the population of an estimated 1.3 million people (a disputed, perhaps over-exaggerated, figure).

(4) Through a succession of Five Year Plans commencing in 1961, Bhutan has established a basic network of infrastructural facilities and economic and social services and a decentralised structure of administration [of 4 zones and 18 districts (dzonkhags)].

(5) Its education system, evolved since 1961, (pre-primary, primary, junior high, high, junior college and degree) is almost a total replica of Indian structures, curricula and examinations. The system has been heavily dependent upon Indian staffing: until recently up to 70 per cent of graduate teachers in all areas were Indian (an incidence reflecting the heavy domination of Indian manpower in all public and private sector employment). A little over 20 per cent of the primary school cohort enters school and there are massive wastage rates [Choeda (1988); World Bank (1989)].

(6) In addition, it shares many of the key disadvantages, disadvantages and characteristics highlighted in *Chapter I*: small networks of influential decision-makers emanating from the Royal Court; multi-functional educational administrators; small pools of human resources; emergent ethnic and multicultural tensions focusing upon the minority and plaintiff Nepalis.

2. *Higher level training prpvision, 1960s-1983*

Prior to the establishment of the *Sherubtse Degree Programme* (1983) substantial numbers of graduates had been trained outside Bhutan, mainly in India but also wider afield Lillis (1990).

The Degree Programme at Sherubtse was an upward evolution of the provision of public education in the country in the period after 1961 and the topping up of the junior college programme that commenced in 1978. Equally, it was an initiative to provide in-country higher educational opportunities that would decrease the dependency upon external training in certain curriculum areas in universities especially in India, but also wider afield. It was conceived, thus, as a cost-saving measure, given the relative economies of in-country and out-of-country training. (In 1987/88, for example, Bhutan spent approximately US$1,000,000 on 74 Government scholarships to India at an average student cost of about US$1,250 as opposed to US$500 per student for in-country training. 1990 out-of-country training costs include approximately US$20,000 p.a. for students in the USA). Equally, the College was intended to satisfy Bhutan's national political aspirations to possess its own apex educational institution that might eventually pave the way for the creation of a fully fledged, internationally-credible, National University of Bhutan. In addition, that institution might serve as an 'ideal college' both within the country and within the Himalayan region. These objectives remain the government's aspirations for the College, the name of which 'Sherubtse.. Peak of Learning' (chosen by the third King together with the founding Principal of the College) symbolises those ideals.

3. The creation of the Sherubtse Degree Programme

The origin and development of Sherubtse College is of more than transient historical interest, for this has shaped the institutional forms and ethos that has an albatross effect upon attempts to innovate and create an institution that directly satisfies the 'needs' and aspirations of contemporary Bhutan.

Paradoxically, for a staunchly introverted Buddhist country, Sherubtse owes its origin to Jesuit influences. Its evolution from high school to public school to junior college to degree college has two important legacies which impact upon contemporary planning and management of higher education.

(a) The College was established on the increasingly archaic Anglo-Indian quasi-public school model, pursuing an Indian curriculum, taught by Indians and examined by the *Indian Council for the School Certificate*

(ICSC), New Delhi. This was an in-country extension of traditional educational linkages between the Bhutanese politico-administrative élite and specific educational institutions in India, particularly the hill stations of Kalimpong and Darjeeling, where the names of the schools read like a litany of Christian saints. Sherubtse's earlier principals and hence key agents of development were, it is true, Canadians, but Indophile, Darjeeling-based Jesuits. Sherubtse has not yet lost this Indian (and even Jesuit) school legacy and remains in ethos, style, staffing and pedagogy an imported model that has not evolved a specifically Bhutanese identity or pedagogy. Equally, its institutional ethos, learning modes, decision-making, control mechanisms and leadership have the feel of school rather than higher education models, although the proposed separation of the junior college from the degree programme would offer the imperatives to alter them (*see 4. below*).

(b) Within the context of this chapter, the most significant aspects of the history of Sherubtse from the founding of Sherubtse Higher Secondary School (1963) until the initial intakes of degree cohorts (1983) were the negotiations for affiliated college status with the University of Delhi. Indira Ghandi's Presidential influence (together with that of the third King of Bhutan) was involved in creating amendments to the University of Delhi Act to enable Sherubtse to become the only (Indian!) foreign college to achieve affiliated status. That Delhi takes the charge seriously is indicated by the appearance of the Vice-Chancellor at the first (1986) Sherubste degree convocation together with inter alia the Bhutanese Minister for Social Services. The College is, thus, an important dimension within the formidably strong Indian-Bhutan Cultural agreement, which has implications for the manner in which the attempts to secure the status of 'autonomy' and break this dependency link are approached and implemented.

4. Access to the Sherubtse Degree Programme

Access to higher education for Bhutanese students is determined exclusively by the ICSC Class 12 examinations as the mechanism by which the Department of Education screens out those who may proceed from 'junior college' to higher education.

5. *The Junior College Programme*

The nature of the junior college programme is important in this discussion, revealing as it does both (a) the total dependency upon India for the provision of curricula, examinations and staffing and (b) the demographic smallness of this level of education, which itself delimits the capacity to expand the degree programme, or to create a national university.

The final stage of the school/high school system was hitherto provided in Classes 11 and 12 subsequent to the Class 10 examinations which are also conducted by the ICSC. This provision is the classic Indian educational model. All such education in Bhutan has been provided at Sherubtse.

Importantly, Class 12 leavers have had three predominant education and/or training opportunities:

(1) selection for 'training' at in-country training institutions (e.g. the Royal Bhutan Polytechnic, Deothang), which provide courses in a range of vocational areas for lower level school leavers, and thus encourage few (if any) intake from Class 12;

(2) selection for higher education of a 'professional' orientation in universities in India and elsewhere, for those who score 60 per cent+ in the Class 12 examination. These include the fields of medicine, dentistry, pharmacy, veterinary science, and engineering. Opportunities are provided through Bhutan Government scholarships and Fellowships and through bilateral aid programmes, occasionally through links to specific Universities (especially in India) which reserve places specifically for Bhutanese students. Some are privately financed students. Importantly, this selection creams off the high fliers within the school system and, in part, creates a vacuum in Sherubtse's Faculty of Science which survives on minimum numbers of questionable quality;

(3) selection for in-country degree ('undergraduate') programmes, for those who do not achieve the criteria to enter (2) above. Although a limited number of students follow the B.Ed.

programme at the *National Institute of Education* (NIE), Samchi, this, for the majority, means the three available degrees offered at Sherubtse. The range of options are directly those on offer within the University of Delhi *Schemes of Examinations and Courses of Reading* for the B.A (Pass), B. Com (Pass) and B.Sc. (General) degrees (although the Delhi degrees offer a far wider range of choices than those pursued at Sherubtse). The Class 12 Faculty passes are the direct feeder streams to these courses.

Although until 1991, the NIE admitted undergraduates into teacher education programmes, the entry enrolments to Sherubtse are the most pertinent for this chapter. The total student numbers at the College reveal the balance between the junior and degree enrolments, indicating the domination of the college by the top end of the school system. As with other small systems Packer (1989 b), the in-country degree programme can survive economically only by creating a plural institution – but at the cost of the ethos of higher level education.

Most significantly, when compared with the output from plus 2 (i.e. the junior college), there is a substantial haemorrhage of science students as a result of creaming off the higher attainers in science to attend 'professional' courses in India. This creaming off process has a major impact upon (i) the numbers entering Sherubtse's Science Faculty and (ii) the excessively limited capacity for future expansion of the College towards a balanced higher education curriculum.

An analysis of enrolment numbers Lillis (1990) makes three obvious and eloquent statements; (i) of the disproportionate enrolment bias towards arts and commerce; (ii) the relative and absolute small numbers enrolled in the science faculty; (iii) the overall male/female inequitabilities of access, reflecting the gender distortion of the educational system as a whole. The limited numbers enrolled in Sherubtse reflect both the small size of the country's population and the relatively small size of the country's school-going population. Obviously, availability of higher level manpower and the higher education students upon which that will be based is entirely dependent upon the school feeder system and, hence, is totally dependent upon provision of opportunity at primary school level and the expansion of junior secondary and high school education. At present, despite the ideals of the Conference on Education for All, Jomtien, Thailand in 1990, there is likely to be only a slow expansion towards an ideal of universal basic education.

In addition to the demographic implications raised above, there are important qualitative dimensions relating to the higher education cohorts. These relate to the educational quality spiral within the school system. The awareness of the qualitative limitations of the teaching and learning process at every level has led to a range of strategies targeted at critical determinants of school quality and effectiveness. These include the New Approach to Primary Education Harley et al. (1989); Collister (1990); improved teacher education; improved teacher/pupil ratios; improved processes of curriculum development and, hence, better and more relevant curricula (including a proposal for a 10-year attack upon the quality of science teaching and learning with a practical orientation specifically relevant to Bhutan); improved materials provision; improved school construction and maintenance; improved support for head-teachers; decentralised and participatory approaches to decision-making in education; continued school-feeding programmes; better public and primary health education etc. All these strategies are targeted at the long-term improvement of the output of primary, junior secondary and high school education, both as terminal cycles and as feeder cycles for the next level of education. Ultimately, if successful (and there are, of course, reasons to question whether Bhutan's qualitative achievements can improve upon those of other Less Developed Countries (LDCs)) this will impact upon the quality of the intake into higher education – but not before the turn of the century. The reality that this time-line imposes upon the planning and management within higher education can be ignored only with dangerous long-term qualitative implications at this level. It is to the issues of quality within Sherubtse that this chapter now turns.

6. *Quality of Sherubtse intake*

A key issue related to proposals to move towards the creation of a future University of Bhutan is the qualitative capabilities of the student intakes and the levels of student achievement.

The Delhi-based ICSC Class 12 Examination, as it has already been said, is used as the assessment criterion for Class 12 leavers in Bhutan. This examination will continue to be used as the yardstick of the quality of the junior college output until such times as the Bhutan Board of Examinations develops the capability of designing and implementing examinations systems at this level in an assessment-dominated system. Given the Board's overload with Class 6 and 7 examinations and its limited skills, capacity and capability in examination design and management (not atypical on many examinations boards), this is inconceivable within the perceptible future despite personnel, structural and process changes occurring within the Board. In any case, the Board will still have to conquer the control of the Class 10 examination from ICSC which still administers it from New Delhi.

Here it is not possible to comment upon the validity of the existing assessment procedures as indicators of pupil quality and achievement, although, as elsewhere, such scores are used here as a proxy for achievement of Bhutan Class 12 leavers. An analysis of the aggregate scores of the Sherubtse degree entry cohorts over time by Faculty since 1983 is provided in Lillis (1990). A major issue is that there are relatively low mean levels of attainment over time on entry to each Faculty: arts (56.73), commerce (58.26) and science (53.97).

7. *Quality of degrees*

Secondly, as the Lillis (1990) analysis also shows, the quality (and numbers) of Sherubtse's graduation results for the years 1986-1989 are not substantially high. The majority of degrees are 2nd or 3rd Class, which does not indicate high levels of student performance – arguably a major criterion for the evolution towards Honours courses and an autonomous University. Overall student attainment may, of course, be related to low levels of teaching performance and capability, one crucial determinant of teaching/learning outcomes. From that perspective, the high 1989 Science Degree results (4/5 1st Class awards) may be seen as reflecting the quality of teaching possible in the quasi-tutorial groups that can be provided in the small groups for science (in contrast with the lecture sessions targeted at the groups of 30/40 in arts and science). However, 'staff-intensive' groups of 4/5 science students are hardly cost-effective as teaching units. No attempt is made to analyse the teaching/transmission processes in action, although there are important observations relating to staffing past and present that are central to the future development of Sherubtse.

8. *Staffing at Sherubtse*

In the period 1983-1989, the College was heavily dependent upon non-nationals. The aggregate numbers and percentages of nationals grew from four (15.4 per cent) in 1983 to seven (23.3 per cent) in 1989. However, there had been no substantive shift in the curriculum biases of nationals. In 1983, nationals taught the national language, Dzongka (3) and geography (1). In 1989, nationals taught Dzongka (4), English (1), commerce (1). The principal was a non-teaching administrator (which effectively means that 6 out of 22 of the teaching staff were nationals).

An analysis of staffing patterns Lillis (1990) shows the high dependence upon external staffing for all areas of the curriculum, apart (understandably) from Dzongka. In particular, since 1983, there was a constant presence of nine lecturers (one for each major teaching department, Dzongka – the national language, not surprisingly, excepted) from the University of Delhi under the *Colombo Plan for Technical Co-operation*. Importantly, all Colombo Plan lecturers, on 'deputation' to Sherubtse for 5 years with renewable options, were experienced University lecturers, at undergraduate and, in some cases, post-graduate levels. All were well qualified (at least on paper) with at least Masters' Degrees in arts, commerce or science. In the same period, only three Ph.D. holders did not come under the auspices of the Colombo Plan. Although here paper qualifications are not equated with higher education teaching expertise or methodology (and the international equivalency of many Indian higher level degrees is suspect), the Plan personnel provided the overwhelming bulk of experience at the College and provided a shadow of expertise to its staffing profile without the substance upon which autonomous development might be launched.

9. *Towards 'autonomy' in higher education*

In the period of Bhutan's educational transition, the Delhi University College programme at Sherubtse and the forces involved in its implementation (*identified above*) evolved as a result of the needs and desires for courses to generate higher level manpower to staff the slowly emergent economy. Delhi provided the vehicle in the absence of Bhutan's own capacity to design and assess its own country-specific courses. Within a further transitionary stage evolving within the country, there is a considerable pressure and attendant debate over the desirability of evolving towards 'autonomy' and/or towards the creation of an independent University of Bhutan.

Despite the weight of the dependency illustrations provided in the chapter, Sherubtse *de facto* possessed considerable autonomy from the University of Delhi, even within its status as an affiliated college. It controlled finances and admission criteria and there were relaxed University of Delhi staffing norms. It, however, sought an extension to such autonomy:

(a) in order to enable it to create appropriate and innovative courses more applicable to Bhutan's contemporary development needs, as well as to specific sectoral manpower needs; in other words 'curriculum decision-making autonomy';

(b) in order to evolve assessment strategies (e.g. including continuous assessments or project and practical work) more attuned to global contemporary thinking on the inter-relationship between examinations and the quality of learning; in other words 'examination decision-making autonomy';

(c) in order to satisfy the wholly appropriate socio-political aspirations of an independent and modernising nation-state as a prelude to the establishment of an internationally credible National University; in other words 'institutional decision-making autonomy'.

Hence, the under-explored notion of 'autonomy' has a variety of connotations. Sherubtse might achieve different stages at different phases of time moving firstly towards autonomy as an 'affiliated' Delhi College with increased representation over curriculum decision-making to enable the 'Bhutanisation' of curricula. Still affiliated, Sherubtse could establish and develop curriculum decision-making machinery in the form of Subject Panels and monitoring mechanisms framing specific Bhutan Honours syllabuses under the guidance of Delhi Heads of Departments and under Delhi examination regulations.

From such affiliated status ('curriculum decision-making autonomy'), it might in time move towards the creation of a self-examining body under the control of the University of Delhi to formulate, for example, internal assessment procedures for degree years 1 and 11, leaving Delhi to make final year assessments, with degree results being a combination of both processes. In time, it might, with external validation and examination from other international bodies take control over its own degree awards (as, for example, the National Institute of Education (NIE) does with external examiners, setters and moderators from the University of London) ('examination decision-making autonomy').

But what time-scale should operate for an impatient nation to achieve such a process of phased, 'gradual autonomy'? Gradualists would argue that it is still too early in Bhutan's development era to launch an autonomous higher education institution that totally satisfies the aspirations of national identity – for amongst other parameters, national staffing and capability are central to the initiation and sustenance of such 'institutional decision-making autonomy'.

A slow gestation period suggested above would enable the College to:

- build up curriculum expertise;
- create the base of Bhutanese content (as yet not readily accessible in scholastic form in most subjects, including the focal culturally-constructed Arts subjects that would be the centre of the moves towards Bhutanisation of the curriculum);
- confront critical questions of national staffing capacity and capability (although the substantial critical mass of staffing would be non-nationals);
- await increased numbers (and capability) of students on the back of the expansion of the high school output that would make an autonomous college a cost-effective viability.

The phased evolution of 'autonomy' would depend upon the satisfactory resolution of the above planning parameters. Within a context of 'total autonomy', particularly if this means 'disaffiliation' from the University of Delhi, the opportunity would be provided to formulate syllabuses regardless of University of Delhi regulations (as under affiliated, or partial, autonomy suggested above).

The complexities of the above are easy to underestimate, and nationalists may too easily overlook the critical questions of available Bhutanese manpower with the expertise and capability to:

- provide academic leadership and management; and
- provide higher education curriculum process skills, including design, packaging, transmission and assessment (although a discussion of the specific dimensions of curriculum building and the alternative international linkages to facilitate them is not possible within this chapter).

10. The concept of the National University

As Teasdale (Chapter VIII) shows, discussions over the development of University capability in small – or large systems – is rightly a sensitive issue considering the multiple and complex roles of:

- teaching;
- research and knowledge production, creation and dissemination development facilitation and extension;
- post-graduate training.

Sherubtse has, hitherto, trained graduate manpower, thus fulfilling a cadre production function. It has played none of the other three roles and has only a limited capacity and capability of doing so.

The country has neither the higher level teaching capability, planning capacity and research expertise nor the critical masses of high quality student numbers to justify the establishment of a University before the end of first decade of the next century at the earliest. Even then, serious consideration might well be given to the feasibility of the concept in view of the major constraints that typify those of many small countries. This is discussed below.

Nevertheless, there is an urgently felt need to enable the national drive towards the formulation of specific Bhutan related courses and delivery structures, and to determine what courses and content can be taught within higher education in a viable way based upon available student numbers. This is the core of the discussion over 'autonomy' as a stepping stone towards a strategy for a National University as part of the national drive towards the fulfilment of national self-reliance based upon the development of indigenous institutions attuned to the specific needs of Bhutan. Without it, clarion calls about authentic national identity will remain mere rhetoric and the reality will remain cultural and educational (as well as commercial and military) reliance and dependence upon its proximate neighbour, India.

Although the idea remains very embryonic, Bhutan's Vth and VIth Development Plans leave no doubt of the commitment towards this goal, the willingness to experience the teething problems associated with it and to confront hard economic and equity questions about the development of the higher education sector which take into account the relative priority needs of other sub-sectors and, for example, the clamours of the underdeveloped primary education and primary health care sectors. There remain central questions of cost and feasibility in the face of limited numbers of high quality students, minimal national staffing capability for the four functions indicated above, high unit costs and the dependence upon external manpower and funding. As Packer (Chapter IX) suggests, these are typical for small systems post-secondary education.

For the next two decades, the development planning realities are likely to thwart Bhutan's capabilities and aspirations to launch its own *bona fide*, academically credible University. In sum, the planning constraints include the cyclical impact of:

- late development;
- an embryonic school system;
- limited intake and output from that system;
- inferior school quality;
- inferior pupil attainment;
- the lack of adequate numbers of quality teachers assisted by other educational infrastructure to facilitate the improvements at school level;
- inadequate qualitative and quantitative intake and output from higher education and the consequent manpower and expertise vacuum to stimulate the socio-economic development that might create the manpower to fill the vacuum;

- the consequent dependency upon expatriate, non-national, manpower both within the socio-economy and within the educational system ;
- the concomitant dependency upon imported educational models, curricula, institutions, materials, epistemologies and examinations;
- the imperatives to create national manpower to replace the above in the interests of authentic national identity;
- the urgency to create national institutions to accelerate the above but within a framework of constraints of costs, manpower and institutional capacity and capability.

11. Conclusion

As this book shows, Bhutan is not unique and isolated in the above constraints. All typify the socio-economic realities confronted by many small developing countries planning systems of higher education. Many Universities in small developing countries are bedeviled by:

- excessively high unit costs at the level of higher education (the result of infrastructural investments, staff costs, low staff/student ratios, student stipends etc.);

- consequent major ideological and equity questions related to investments in primary, secondary and higher education and relative social and private rates of return from each;

- inability to tie down a close correspondence between higher education and labour markets;

- curricular imbalances with a domination of Humanities Faculties (necessary in order to create a sufficient pool of students to create a viable institution in the absence of numerical and scientific literacy amongst the majority of school pupils);

- major use of outside institutions for specialist Science/ Technology/Professional and Post-Graduate Education;

- limited national staffing capacity and capability, resulting in a high incidence of expatriate lecturers etc and the dependency syndrome;
- domination of undergraduate teaching and lack post-graduate teaching as well as of research output.

In this context, it may well be appropriate to give serious consideration to not investing in the creation, generation and operation of a micro-university with a limited range of disciplines and manifesting much of the above. It may be more appropriate to unite efforts with other countries, e.g. in the *South Asian Association Regional Committee* (SAARC), Maldives to promote the establishment of a regional higher level institution (similar, for example, to the UWI or the USP) where the complementarity of available human and material resources creating economies of scale might equally satisfy the differential needs of individual countries. Within *SAARC*, Maldives, for example, has no possibility of establishing its own higher education system and might collaboratively benefit from regional institutions.

Bhutan faces many dilemmas relating to the policy for, and orientation of, higher education. Many of the dilemmas relate very specifically to the question of what kind of socio-economic development policy will be defined for the first quarter of the next century. That policy decision, based upon the country's unique heritage in the context of contemporary modernisation, will guide the thinking over the nature of Bhutan's higher education system but cannot ignore the constraints emerging from the small states syndrome, which the country shares with others discussed in this volume.

Chapter VIII

Higher education in small systems: a Pacific Island perspective

by Robert Teasdale

1. Introduction

The provision of higher education is a particularly expensive undertaking, especially for small and/or developing countries. World Bank data cited by Heyneman (1989), for example, show that public expenditure per higher education student in Sub-Saharan Africa in 1983 was 45 times greater than expenditure per primary student. Developing countries' universities, Caston (1989) asserts, are 'absolutely expensive'. Altbach (1989) agrees: in terms of developing countries' economic capabilities " ... universities continue to be supported lavishly": the basic problem is the high cost of specialist staff. As Caston (1989) points out, the higher education institution, even in a developing country, has western standards of consumption and, thus, demands that its academics are paid sufficiently to deter them from selling their talents in a western-dominated market place.

Yet most countries are continuing to place high priority on the development of post-secondary facilities – especially of universities. A national university is presumed to add significantly to national identity, status and prestige as Lillis (Chapter VII) shows. It is also believed capable of responding with greater flexibility and appropriateness to national development needs, providing more culturally sensitive and relevant higher education than is available in larger metropolitan countries. For small developing countries a university also may be seen as an attractive lure for aid donors seeking tangible means of supporting human resource development.

The smaller the country, however, the more difficult the task of providing an effective programme of higher education, see again Lillis (Chapter VII). While generalist undergraduate programmes might be marginally feasible, most small countries simply lack the resources to support specialist activities.

One obvious solution to this dilemma is that of the multi-country institution. Yet only two significant facilities of this kind have developed in recent decades: the University of the West Indies (UWI) and the University of the South Pacific (USP) This chapter provides a case study of the latter, seeking to identify the factors that have contributed to its success and to suggest changes in direction that might be required if it is to continue to make an effective contribution to higher education in the Pacific region. Implications for other small states will also be considered.

2. *The University of the South Pacific (USP)*

(a) The context

Founded in 1968 with an initial enrolment of 154 pre-tertiary students, the USP has grown steadily, 9,080 students being enrolled in 1990, representing a full-time equivalent of 3,464. Initial impetus for the establishment of a university came from New Zealand and the United Kingdom, with strong support from Fiji. The Royal New Zealand Air Force flying boat base at Laucala Bay in Suva was made available by the government of New Zealand, thus providing a large and beautifully sited tract of land together with ready-made buildings Aikman (1988).

From the very outset, the USP was conceived as a fully autonomous regional institution serving the higher education needs of a number of separate countries as, indeed, was UWI. At the time of its establishment only three of the 11 Member Countries were independent (see *Table 1*), the remainder all having colonial links with New Zealand or the United Kingdom. The legalities of framing a suitable constitution for a multi-country university proved complex, eventually being resolved by requesting the granting of a Royal Charter. The Charter and accompanying Statutes were approved by Queen Elizabeth II on the advice of the Privy Council in February 1970 and the following month were presented personally by the Queen at a ceremony on the Laucala Campus Aikman (1988).

Table 1. The USP Member Countries *

Country	Constitutional status	Year of independence	Population (000's)**
Cook Islands	Self-governing in free association with NZ	1965	18.2
Fiji	Independent republic	1970	740.8
Kiribati	Independent republic	1979	67.6
Nauru	Independent republic	1968	8.9
Niue	Self-governing in free association with NZ	1974	2.5
Solomon Islands	Independent state	1978	312.2
Tokelau	NZ trust territory	-	1.7
Tonga	Independent monarchy	***	99.6
Tuvalu	Independent state	1978	8.5
Vanuatu	Independent republic	1980	154.7
Western Samoa	Independent state	1962	178.0

Notes : * Additional demographic, economic and geographic data are provided by Luteru (Chapter X).

** 1988 data, except for Cook Islands, which are 1985 [data from Australia (1989): Douglas and Douglas (1989)].

*** Tonga has always retained independence as a constitutional monarchy.

All 11 of the original countries have maintained their association with the University. Eight are now fully independent, two self-governing and one remains a dependency of New Zealand (see *Table 1*). Each is represented on the central governing body of the USP, the University Council, the larger countries having more than one member. In this sense the University is corporately owned and operated by the governments of its 11 Member Countries. It appears likely that 2 more countries – Marshall Islands and Federated States of Micronesia – will join the USP as they seek to reduce their dependence on the USA and strengthen their regional links Balawanilotu (1990).

It is important to recognise that, while the 11 countries share a common geographic region, there is wide cultural, linguistic, environmental, economic and political diversity both within and between them. Four major groups dominate – Melanesian, Polynesian, Micronesian, and Indo-Fijian – each with very distinctive political and leadership styles. Polynesian countries such as Western Samoa and the Kingdom of Tonga, for example, have highly structured, chieftain systems that place power in the hands of a small élite.

In contrast, Melanesian countries, like Vanuatu, are typified by small, locally-organised language groups with a much more egalitarian style of decision making.

While the various Polynesian countries share a common linguistic heritage, the two western Melanesian countries (Solomon Islands and Vanuatu) have over two hundred distinct languages as well as Pidgin English and, in the case of Vanuatu, French.

Some countries are volcanic in origin and offer an ideal environment for food production, thus allowing a life-style of subsistence affluence for most rural dwellers. Others are based on a fragile stall environment, sand soil, fresh water and space for animal production. The data presented in *Table 1* and elsewhere highlight the variations in the population size and density, resource base, and geographic spread over land and sea areas. Economic indicators also reflect similar diversity, with GNP *per capita* ranging from US$460 to US$9,091 and aid *per capita* from US$46 to US$1,143 annually Australia (1989).

Another important feature of the USP region is its size, especially when compared with its scant population. Kiribati alone, with only 68,000 people, boasts an east-west axis equivalent to that of the USA. *All* the countries are small by world standards. Even the largest, Fiji, has a population of less than 750,000 while the smallest – Niue, Naura, Tokelau and Tuvalu – are classic micro-states with populations of less than 9,000. The countries are widely dispersed over a sea area of almost 11.5 million square kilometres, creating travel and communication difficulties both within and between them Luteru; Ryan; Teasdale (in press).

(b) The role of the USP

To understand the present role of the University it is helpful to consider its various functions separately:

(1) The preliminary and foundation years

Because of limited or non-existent teaching provisions at upper secondary levels in most Member Countries it was necessary for the USP to develop pre-tertiary programmes and, in the early years, a major preoccupation was the development of courses equivalent to the penultimate and final years of secondary school, designated respectively as the USP preliminary and foundation years.

In 1968 the enrolment was entirely pre-tertiary. In 1969 it comprised 68 per cent. By 1974 it had declined to 32.5 per cent, and by the early to mid-1980s it was averaging 25 per cent. In the past two years, however, it has begun rising again, up to 33 per cent in 1989 – a surprising trend in view of the University's wish to relinquish responsibility for pre-tertiary programmes as Member Countries supposedly extend the availability of upper secondary provisions.

It seems regrettable that after 22 years the USP still faces the dilemma of devoting almost one third of its teaching resources to being, in effect, an upper secondary school,a complaint also directed at UWI.

(2) Degree, diploma and certificate programmes

Originally the USP was structured around three teaching schools: (i) social and economic development; (ii) natural resources and (iii) education. A fourth was added in the mid-1970s when the government of Western Samoa provided the facilities for a school of agriculture, thus leading to the establishment of the Alafus Campus on the outskirts of

Apia. Bachelors degrees have been offered in arts, science, education, agriculture and, more recently, technology. Undergraduate diplomas and certificates are available in a range of fields, the most heavily subscribed being education, accounting, tropical agriculture, librarianship, legal studies and English as a second language. Enrolments in post-graduate degrees (Masters and Ph.D.) have always been low – generally about 2 per cent of total enrolments – reflecting the preference of most Pacific Island students to pursue post-graduate studies in rim countries and beyond.

(3) Teacher education

During the first 15 years, the USP's prime function was the preparation of teachers to service the expansion of secondary schools in most Member Countries. Statistics show that between its inception and 1982 slightly more than 58 per cent of all graduating students obtained a formal teaching qualification (i.e. Diploma in Education, Bachelor of Education or Graduate Certificate in Education), and many others were known to have taken teaching positions without completing a teacher education award. In fact, some estimates suggest that as many as 80 per cent of all full-time USP students during the 1970s subsequently entered the teaching profession Teasdale; Murphy (1989). By the early 1980s, however, initial secondary school staffing needs had been met and a marked decline in demand became apparent. Following a major review in 1983 of the future directions for the USP a reorientation of the teaching programmes took place.

Table 2. Pre-service teacher education students as a percentage of total undergraduates (data based on internal full-time enrolments)

1981	56.13	1984	38.15	1987	11.12
1982	53.62	1985	21.38	1988	4.12
1983	46.70	1986	11.84	1989	6.07

The School of Education was reduced to department status within a newly formed School of Humanities, and the University adjusted with little apparent difficulty to the decline in teacher education numbers shown in *Table* 2.

(4) Applied studies

In the early years of the USP there was relatively little to distinguish the teaching programmes from those of universities in the western world, curricula generally being modelled on those of the United Kingdom, Australia and New Zealand. For example, the major sequences of study offered by the school of natural resources were in the fields of physics, chemistry, and biology; the professors in these disciplines invariably were recruited from metropolitan countries, and course content mirrored that of their home institutions. Although a number of more applied programmes were developed during the 1970s, especially at certificate and diploma levels, a major concern that emerged during the 1983 future directions review, was the need for a different kind of graduate, one with applied skills and more specific vocational training, yet one with sensitivity to Pacific cultures, needs and life-styles Teasdale (1983). As a consequence, regional governments requested that the USP gives priority to developments in two broad areas:

> **"The first was business studies with a broadly-based degree programme incorporating economics, accounting, commercial law, computing and administration. ... The second was that of applied science with an emphasis on alternative energy sources,hydrology, geophysics, marine biology and fisheries, food technology and processing, etc."**
>
> *Report: Regional Conference on Directions for USP (1983) p. 9.*

In the years since the review, the USP has responded constructively to this request, and the marked downturn in the teacher education programme has been counterbalanced by the development and expansion of courses in a wide range of applied disciplines. In recent years, for example, several new degree programmes have been developed:

Bachelor of technology, with an emphasis on applied engineering and alternative technology.
Bachelor of science in environmental studies.
Bachelor of arts in business studies.
Bachelor of arts in land management and development.

At the time there had been a proliferation of shorter diploma and certificate courses in response to specific regional needs in specialist areas such as ocean resources management, population studies, community development, law, management studies, clothing and design, tropical fisheries, applied computing, agribusiness, journalism and pacific language studies, University of the South Pacific (1989a).

(5) Extension services

Central to the ethos of the USP is the provision of off-campus programmes in each of its Member Countries. The Extension Services Unit discussed by Jenkins (Chapter VI) was established at an early stage in the history of the USP to offer a full range of distance education courses. The unit functions as an integral part of the University, providing course developers to assist academic staff in the schools to prepare their courses for distance teaching. The primary methodology is based on the provision of printed material in the form of course notes, background readings and set textbooks, and requires students to respond with written assignments and to sit final examinations.

A USP Extension Centre is located in each of the countries of the region except Tokelau, which is serviced from the Western Samoa Centre. There is a sub-centre in Vanuatu on the island of Santo. Staff of the Centres offer counselling services to students and prospective students, provide tutorial and marking support in some courses and generally assist with administration programmes. They also provide a significant link between the University and the local community. Centre resources include classrooms, a library and audio/video facilities. A comprehensive teleconferencing system operates between the main campus in Suva and each Centre using either satellite transmission or HF radio. While its main benefit appears to be administrative, the system does allow staff in some courses to run regular tutorial sessions with students around the region. A limiting factor, of course, arises from the dispersed nature of most island countries. In general only about half of the extension students in a given country have direct access to a Centre, the others having to rely almost exclusively on the printed word.

Demand for extension courses has been growing at a far more rapid rate than demand for on-campus instruction. Between 1984 and 1989 extension enrolments grew by 115 per cent compared with only 19 per cent for full-time on-campus enrolments. This is reflected in the percentage of extension students in the total student body [measured in terms of Full-Time Equivalent Students (FTES) which has risen from 26.0 per cent in 1984 to 38.7 per cent in 1989]. During the same period the number of extension courses offered annually has almost doubled, from 75 to 148. Approximately half of the demand is for courses at preliminary and foundation levels.

Extension services also offer non-credit programmes at each Centre as part of its continuing education function. Some are bridging courses designed to give students the self-confidence and motivation to proceed with more formal study. Others emphasize cultural, creative or vocational development. Approximately 5,000 students enrol annually.

(6) The institutes

Following his appointment in 1975 one of the first initiatives of the second vice-chancellor, Dr. James A. Maraj, was a review of academic policy that emphasized the need for the USP to assume a more pro-active role, especially in outreach to the region. Maraj therefore recommended the establishment of an institute associated with the school. His goal was to encourage greater flexibility and support in the provision of consultancy services, applied research and short in-service or vocationally-oriented courses to all Member Countries, Brosnahan (1988).

The institutes have had a somewhat chequered history. Some have flourished. Others have had more fluctuating fortunes. One factor appears to be the calibre and consistency of leadership, another the level of financial support from external agencies. Currently there are seven institutes, (as shown in *Table 3*). Originally it was intended that they be self-financing by charging fees for services. The primary demand has been from regional governments, however, and, therefore, largely non-commercial. The USP has been reluctant to enforce the requirement for financial viability, first because of the important role that most institutions are playing in the region, and second because there has been a tendency for some institutes to plan their work programmes around activities that are most likely to generate income, rather than in areas of greatest need. The role, function and financing of the institutes has been debated extensively within the University in recent years, the most recent decision being " ... that the *status quo* should be maintained " University of the South Pacific (1989b).

Table 3. Structure of the USP by country

Cook Islands

Extension Centre

Fiji

Extension Centre
Laucala Campus

University Administration
- Vice-Chancellor's Office
- Registrar's Office
- Bursar's Office
- Office of the Director of Development

School of Humanities
- Literature and Language (including Journalism)
- Education

School of Pure and Applied Sciences
- Biology
- Chemistry
- Home Economics
- Mathematics and Computing Science
- Physics
- Technology
- South Pacific Regional Herbarium

Table 3 (continued)

School of Social and Economic Development
- Accounting
- Business Studies
- Development Studies
- Economics
- Geography
- History/Politics
- Land Management
- Management and Public Administration
- Ocean Resources Management
- Population Studies
- Sociology

Institutes
- Institute of Education
- Institute of Marine Resources
- Institute of Natural Resources
- Institute of Pacific Studies
- Institute of Social and Administrative Studies

Services
- Community (i.e., Student Welfare) Services
- Computer Centre
- Extension Services
- Library
- Media Unit

Kiribati

Extension Centre
Atoll Research and Development Unit

Nauru

Extension Centre

Table 3 (continued)

Niue

Extension Centre

Solomon Islands

Extension Centre

Tokelau

Serviced from Western Samoa Extension Centre

Tonga

Extension Centre
Institute of Rural Development

Tuvalu

Extension Centre

Vanuatu

Extension Centre
Pacific Law Institute
Pacific Languages Unit
Santo Extension Sub-Centre

Western Samoa

Extension Centre
Alafua Campus:
    School of Agriculture
    Institute of Research, Extension and Training in Agriculture

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(7) Administration and services

The various functions of the USP are supported by a conventional administrative structure of Vice-Chancellor, three part-time pro-Vice-Chancellors (one the head of the Alafua Campus, the other two appointed for a two-year term from amongst the staff of the Laucala Campus), registrar, bursar and director of development, the latter three all have equivalent status and salary.

Academic services include: (a) A library of 400,000 volumes that incorporates a specialist Pacific collection. As the major library in the South Pacific it has responsibility for co-ordinating regional and bibliographic and information services. Library staff also co-ordinate, administer and teach a certificate in librarianship and a diploma in library and information studies; (b) A computer centre that serves as the primary support group for all information processing in the University, including both academic and administrative functions; (c) A media unit that provides audio, video, graphic and photographic support to all sections of the University.

Student welfare services on the Laucala Campus include halls of residence catering for 711 students (201 females; 510 male), a student counselling unit, chaplaincy support, a medical centre and sports, recreation and leisure facilities.

(8) Summary

It is difficult to convey an overall picture of the USP. Despite its relatively small size it provides a diverse range of services to its eleven Member Countries, and has a physical presence in ten of them. An attempt has been made to summarise its structure by country in *Table 3*.

3. Challenges facing the USP

(i) Staffing

All academic and comparable staff are appointed to the USP on three year contracts renewable by mutual agreement. From one perspective this procedure has served the University well, allowing it sufficient flexibility to respond to the rapidly changing needs of the region. From another perspective, however, it has led to undesirably high levels of staff turnover, especially at times of political or economic instability in Member Countries which have resulted in some staff being less inclined to renew contracts. This was especially the case in the period following the military coups in Fiji in May and September 1987. Academic staff turnover in the 1984 – 1986 triennium was 25 per cent; in the 1987 – 1989 triennium it rose to 37 per cent.

One particular challenge facing the University is to define and maintain an appropriate balance between regional staff (i.e. citizens of the USP Member Countries) and those recruited internationally. As shown in *Table 4* there has been little fluctuation in recent years, the only significant variation being in 1988. At that time there appears to have been an exodus of mainly senior expatriate staff from the Laucala Campus as a consequence of political events in Fiji. Recruitment difficulties resulted in the appointment of a higher proportion of regional appointees, many of whom were relatively young and inexperienced (International Development Program of Australian Universities and Colleges, 1988). The position now appears to have stabilised.

Table 4. Academic and comparable staff 1983-1989

	August 1983	December 1986	March 1988	December 1989
Regional staff	149	153	179	161
Expatriate staff	116	107	72	101
Total	265	260	251	262
Percentage regional	56.2%	58.8%	71.3%	61.5%

Regrettably, the USP experiences considerable difficulty in recruiting regional staff for senior academic posts. In December 1989, for example, only one quarter of the forty professors and readers were citizens of the USP Member Countries. A major factor appears to be the much higher level of salaries and benefits paid by international and other regional organisations in the Pacific, and by rim country universities, making it difficult for the USP to be competitive. The situation is likely to improve as more Pacific islanders obtain higher academic qualifications thus enlarging the potential employment pool. Nevertheless, it may be appropriate for the USP to review the salaries it pays senior academics if it wishes to recruit and retain high calibre regional staff.

One highly sensitive set of staffing issues at the USP are those of Member Country representation and ethnic balance. Micronesian and Western Melanesian countries tend to be under-represented while concern is regularly expressed by many Pacific islanders at the relatively high proportion of Indo-Fijian staff. While the USP quite properly asserts that any origin is not taken into account in staff appointments there are occasional suspicions that it does operate as a covert factor.

In any case, it seems inevitable that the issue of equitable national and ethic representation will be a continuing and quite insoluble one for a multi-country and multi-ethnic institution such as the USP, and that toleration and compromise will continue to be required in this area.

(ii) Financing

The USP budget has two quite separate components: aid and recurrent. The former comprises about 40 per cent of total input ($F8.87 million in a total budget of approximately $F23 million in 1989) and is largely in a form of a project aid for capital works, staff development, research projects and specialised non-credit training courses. The recurrent budget (approximately $F14 million in 1989) covers normal operating costs, salaries being the largest single item (about 78 per cent in 1989). 90 per cent of the recurrent budget is provided by the governments of Member Countries, the balance being met from New Zealand and Australian aid. A regional group known as the University Grants Committee (UGC) was established by governments of Member Countries in 1971 to advise them on the foundation requirements of the University and to recommend the most equitable method of providing such funds Aikman (1988). The UGC meets triennially to consider detailed submissions from the USP and to report to regional finance ministers who ratify recommended funding levels.

During the past six years, and despite significant growth in student numbers (a 45 per cent increase in FTE enrolments), the USP has had 'steady state financing' involving no increase in real income, one major consequence being a rise in the student/staff ratio from 15.0 to 18.2 University of the South Pacific (1989b). The quandary currently facing regional governments is whether to provide much needed additional funding or to initiate some form of quota on student admissions. The countries themselves have very limited capacity to pay more: to varying degrees each faces its own problems of limited resources and burgeoning fiscal demands. Yet quotas would pose their own set of unique difficulties: At what level would they be applied (preliminary, foundation, certificate, degree), and in what areas of study? Would they be applied evenly across all countries? Or would it depend on each country's capacity to pay? What of the special needs of the smallest countries?

Increased support from aid donors might appear to be one solution. Yet aid input already is significant and most donors have a strong preference if not a firm policy to provide project rather than programme support. Even the Australian Government, which provides 6 per cent of recurrent budget, has expressed its intention of discontinuing this form of assistance. Solutions, therefore, are most likely to be found within the region itself, not externally.

And these solutions almost certainly will derive from a typically Pacific-style search for 'middle ground' or compromise policies that seek to satisfy as many parties as possible.

(iii) Academic freedom

Any contemporary review of the USP cannot ignore the impact of political events in Fiji during the past three years. Although relatively benign by world standards the two military coups of 1987 and the Internal Security Decree of June, 1988, did introduce new elements of uncertainty and challenges to the USP, forcing a re-examination of the role of the institution in the context of limitations to academic freedom. The immediate response of the Vice-Chancellor to the first coup was an address to the University in which he stressed:

> **"We all, students and staff alike, have an obligation to keep the University going as an example to all the societies of the South Pacific of how our values can survive, whatever may happen to governments."** *Caston, 1988.*

Subsequent events, including the military occupation of sections of the Laucala Campus on 25-26 September 1987, the imprisonment for short periods of three academic staff, and the non-renewal of the work permit of an expatriate academic, created a climate of further intimidation that only quite recently has begun to dissipate. A particularly comprehensive and perceptive analysis of the situation confronting the USP and other developing country universities has been provided by the present Vice-Chancellor, who concludes:

> **"In almost every situation it is in principle, better to preserve the existence of an institution within which there is some freedom, even if limited,...than it is to have no such institution. ...If universities can patiently avoid provoking extinction by impatient and powerful people, they generally find that they can operate with surprisingly little control over the things that really matter in their mission, even in the most unpropitious circumstances."**
> *Caston, 1988.*

The latter certainly appears to have been the case at the USP during the last three years. Nevertheless, the stability of the institution and its continued growth and development might not have been possible without the wise counsel of its leaders, and without the constant stress on the regional nature of the USP. Although Fiji is its largest proprietor, there has been a clear sense of responsibility to maintain continuity of course and service delivery to all 11 countries, the sense of intimidation felt by many staff of the Laucala Campus notwithstanding.

(iv) Relations with other post-secondary institutions

When the USP was established 22 years ago there were relatively few post-secondary institutions in the South Pacific. On completion of secondary schooling – and in many cases even prior to that – it was necessary for most students to transfer to rim countries to continue their education. The only significant exceptions occurred in the preparation of primary school teachers and at teachers colleges in several of the larger countries, of Christian ministers at a number of denominational theological colleges, of agriculturalists in Fiji and Western Samoa, and the doctors at the Fiji School of Medicine (FSM) [Crocombe; Baba; Meleisea (1988); Teasdale; Murphy (1989)].

In recent years several of the larger countries have expanded and consolidated their post-secondary facilities in response to national aspirations and perceived development needs as Packer (Chapter IX) also discusses. There are now teacher training colleges in Fiji, Kiribati, Solomon Islands, Tonga, Vanuatu and Western Samoa, the latter having two colleges, one for primary and one for secondary trainees. Tonga is host to the only private university in the region, Atenisi University, established in 1971 by I. Futa Helu. After the USP the next largest institution in the region is the Fiji Institute of Technology (FIT). Although a national institute under the direct control of the Fiji Government, FIT has a long tradition of offering a proportion of its places to students from other Pacific countries. It teaches a range of vocationally-oriented courses, mainly at certificate and diploma level. The FIT works co-operatively with the USP and some sharing of facilities (e.g. teaching laboratories and workshops) takes place. The USP also has a close working relationship with FSM, having accepted responsibility for approving and conferring FSM medical degrees.

Two new traditional post-secondary institutions have been established in recent years, the Solomon Islands College of Higher Education (SICHE) and the National University of Samoa (NUS). A new community college also is in the planning stages in Tonga. In each case, the governments have indicated that they are not seeking to compete directly with the USP; i.e., they claim it is not their intention to duplicate the USP programmes but to supplement them at preliminary, foundation and general certificate and diploma levels, and with basic degree courses. Evidence of a commitment to co-operative relationships is seen in statutes of both SICHE and NUS which make provision for the Vice-Chancellor of the USP or his/her nominee to be an ex-officio member of their governing councils. Nevertheless, there is evidence that the NUS is reducing quite significantly the number of Western Samoan students enrolled at the USP, the percentage having fallen from 9.0 per cent to 4.3

per cent of total FTEs since 1984 University of the South Pacific (1989b).

The development and expansion of national post-secondary institutions should ideally provide the USP with the opportunity to reduce some of its basic teaching functions, especially at preliminary, foundation and general certificate levels. This might help to curb the current increase in student enrolments, and allow staff to concentrate on the further development of specialised programmes and to extend post-graduate offerings. Yet there is little evidence that this is happening. Dialogue between the USP and national institutions appears both infrequent and inconclusive. Effective collaboration in the form of cross-crediting of courses, programme review and accreditation, staff exchange and development programmes, and the sharing of distance education resources, requires detailed planning and negotiation. As the regional partner in such enterprises the initiatives rest with the USP. Unless the challenge is taken up the USP could find itself missing out on significant opportunities to contribute to the overall coherence and quality of post-secondary education in the Pacific.

4. *Achievements and prospects*

The USP obviously has played a central role in the region during the past two decades. Despite the complexity of its operations it has been surprisingly successful in responding to the development needs of its eleven Member Countries during a period when most have been making a difficult transition from colonial to independent status. It clearly is providing a service to the region that none of its Member Countries could provide individually. Despite the forebodings of its detractors and the crises it has faced during its twenty-two year history, it is noteworthy that the USP has emerged intact and continues to retain the active support of all eleven of its member governments. Jones (1989) concludes that:

> **"... despite the array of 'problems' of scale , dispersion, viability, aid dependence and its regional character, the USP has emerged as a higher education institution to be envied in the developing world. On the one hand it is instantly recognisable as a university that meets its international obligations to maintain university-level standards in its teaching and general pursuit of scholarship and learning. On the other hand, it has forged a unique character by turning many of its problems into virtues and opportunities: it has compensated for the relatively undeveloped state of many of its surrounding school systems; it has maintained strong community-based teaching through its extension and continuing education work;**
> **... it has challenged the tyrannies of dispersal and distance through high quality distance teaching; it has resisted any temptation to take on a western-inspired disdain for development-inspired stances in its work: and it has played a significant role in strengthening that regionalism of which it itself is a manifestation."**
>
> ***Jones, 1989.***

While some of Jones' superlatives might not be fully deserving there is no doubt in the essential effectiveness of the USP as a regional institution. In terms of physical plant and facilities, numbers of staff employed and extent of its communication networks, the USP is undoubtedly the largest regional organisation in the South Pacific and is widely considered to be amongst the most successful. Judging by the extent of the development assistance that the USP receives it obviously enjoys the confidence of a wide range of donor countries and agencies.

What are the factors that have contributed to the success of the USP and that might provide pointers for smaller states seeking to work collaboratively in higher education?

(i) Quality of staff

The USP has been exceptionally fortunate in the quality of leadership provided by its four vice-chancellors, and by the depth of commitment and expertise of senior staff who have served the institution over the years. In retrospect it seems that the unique concept of a multi-country, multi-ethnic institution has attracted a cadre of singularly talented individuals, both regional and expatriate, and somehow excited and motivated them to unusually high levels of loyalty and effort. In reviewing the USP first six years Aikman (1988) comments on "... the sustained and at times contentious effort directed towards setting up the University". He stressed that "... the effort has been that of people ...", not only staff but the USP Council members, students, government ministers and officials from all Member Countries, aid donors, and assessors from other universities. His basic point is still valid to-day. Over the years an exceptionally wide and talented cross-section of individuals has contributed to the development of the University in ways that are not common in larger and more conventional single-country settings.

(ii) Structure

Despite the quite trenchant criticism by Crocombe; Meleisea (1988, 1989) of the 'colonial influences' that shaped 'centralist philosophy' of the USP, the basic structure bequeathed by its founders has served the University well.

Rather than using a series of semi-autonomous campuses, as at UWI, the USP is based essentially on a 'hub and spokes' model centred on Laucala Campus in Fiji. Such a structure has an inescapable logic. Fiji is by far the largest country in terms of population, it is the most economically diverse and stable, and geographically it lies at the approximate centre of the region. Furthermore, the USP structure maps precisely onto the basic patterns of trade, transport, communications and regional politics in the South Pacific.

One of the strengths of the hub campus has been the capacity of the USP to build up a strong teaching and resource base so essential to the provision of effective academic programmes. A more decentralised model would have created particular difficulties for extension teaching, probably resulting in diffusion of effort. Another strength of the USP structure is its essentially dynamic nature. It is not the same institution that it was 20 or even 10 years ago. Although the major founding influence may have been colonial, Crocombe; Meleisea (1988, 1989) underestimate the ingenuity of Pacific Island people in adapting the institution to suit their particular needs. Its outward structure may have changed relatively little but the internal dynamics are substantially different. The USP's decision-making processes and administrative procedures, for example, have been adapted – and continue to be adapted – to reflect local cultural patterns.

(iii) Celebration of culture

One of the strengths of the USP is its capacity to affirm cultural identity. It does this both academically and socially. Within its academic programmes it offers a range of courses in the field of Pacific studies that deal with the linguistic, social, cultural and historical dimensions of Pacific Island societies. Additionally, many other courses in areas as diverse as applied sciences, literature, education, land management and business administration and accounting are studied through a Pacific Island lense as well as a western one. In this way local knowledge is affirmed and valued. Socially, for those students attending classes on the two campuses, a range of cultural activities is promoted. The national days of Member Countries are celebrated with flag raising ceremonies, displays of song and dance, poetry readings and other cultural activities, while the dining halls provide special menus reflecting the cuisine of the particular country.

One week each year is set aside as 'Pacific Week', an occasion for a great deal of celebration of culture, and of cultural difference. All of this has helped the USP to develop a distinctive ethos that is valued by Member Countries and that has strengthened its identity as a regional institution.

(iv) Regionalism

There is sense of vulnerability amongst the micro-states within the Pacific basin, as elsewhere as Lillis suggests in Chapter I. They occupy tiny islands scattered across the world's largest ocean. Their populations are minute by world standards. Yet they are surrounded on the basin's rim by many of the world's largest and most powerful nations. Regional solidarity therefore becomes more a matter of necessity than of preference. Economic, environmental and strategic concerns dictate a realistic approach to regional co-operation.

Survival, not altruism, is the basic motive. It is within this context that one must view the commitment of regional governments to the success of the USP. Several facets should be noted:

(a) The University does not stand alone as a regional institution but is part of a wider pattern of collaboration between Pacific Island countries. Its role interlocks with that of other agencies such as the South Pacific Commission, the Forum Fisheries Agency and, most importantly, the Forum Secretariat. The latter, in fact, initially shared the Laucala Campus with the USP and now occupies an adjacent site. Its current director, Henry Naisali, also serves as chairman of the USP Council. Within this interlocking network of regional agencies the USP is able both to give and receive support in ways that affirm its significance to Pacific Island governments.

(b) Within these regional groupings there is strong respect for the rights and autonomy of individual nations. Leaders tend to avoid overt criticism of each other and are non-intrusive in each other's domestic affairs. During 1987, for example, while rim country leaders fussed and fumed about the Fiji coups, Pacific Island leaders remained discreetly silent, refusing to be drawn into what they saw as an internal matter for the people of Fiji. While respecting each other's ongoing search for national identity, however, leaders do show a remarkably united front on matters of regional concern, recent examples being their response to USA tuna poaching and Japanese driftnetting. A review of those occasions when the future of the USP has appeared most uncertain suggests that regional leaders do have the capacity to work in a unified way to ensure its continued effectiveness as a regional institution.

(c) The recent development or expansion of national post-secondary institutions in the larger countries – Fiji, Solomon Islands, Tonga and Western Samoa – provides an interesting case study of regional commitment versus national development needs. Despite the inherent tensions political leaders use a blend of tolerance and compromise that appears effective. On one hand, they seem able to satisfy their electorates that they are committed to finding local solutions while, on the other, assuring their regional colleagues that they remain committed to supporting the USP. While observers such as Crocombe; Meleisea (1988, 1989) see the tensions as potentially damaging to the USP there is considerable evidence to the contrary. Both Herr (1985); Jones (1989), for example, foresee increasing growth and sophistication in the operation of South Pacific regional co-operation, viewing tensions as an inevitable part of any regional activity. Certainly the evidence of the last 10 to 15 years suggest that governments will remain supportive of regional initiatives such as the USP. National self-reliance is simply not an option. In the present world economic and political climate none of the Member Countries is likely to risk regional insecurity by withdrawing its support from such a major institution as the USP.

(d) One final facet of increasing importance is the role that the USP has played in training the present generation of political leaders and senior public servants in the Pacific. Many have lived, worked and played together while full-time students at the Laucala or Alafua Campuses. In this context national barriers are superseded, cultural differences celebrated and lifelong friendships forged. These patterns of friendship and affiliation are becoming increasingly evident at regional gatherings both for their strength and their potential to resolve conflict. The contribution of the USP to regional cohesion, therefore, is a significant one. Additionally, of course, the USP is a beneficiary. The goodwill of its graduates and their personal knowledge of how it operates ensures supportive and informed decision-making when University matters are discussed at the USP Council meetings and other regional forums.

(v) Donor support

International agencies and donor countries have played a significant role in supporting the USP. Almost all major buildings on the two campuses, and most of the Extension Centres, have been provided by the governments of Australia, Canada, New Zealand and the United Kingdom. Donor support for equipment, library materials, research activities and special projects has been ongoing.

Training for regional staff, both academic and general, has been extensively supported by a wide range of agencies. From a donor perspective assistance to the USP undoubtedly is an attractive proposition: it contributes to regional stability while at the same time being a very visible means of supporting human resource development in the Pacific. Interestingly, donors have been very cautious about supporting national post-secondary initiatives. The Government of Western Samoa, for example, has been unsuccessfully seeking major capital assistance for a new NUS campus for the past five or six years. There appear to be some fairly delicate checks and balances operating here. While providing low-level support for NUS, donors are wary of being seen to undermine the major investments that they and others have made at the USP. In some ways these investments represent a form of security for the USP, helping to ensure the continued backing of donors.

5. Conclusion

The provision of effective post-secondary and even upper secondary education can be an impossible task for small states faced by fiscal constraints and limited human resources. This chapter demonstrates the feasibility of a multi-country, multi-ethnic institution as one solution to the planning and management of higher education in small systems.

Part III

Co-operation in small states

Chapter IX

Planning and management of education and human resource development in small states: dependence and interdependence

by Steve Packer

1. Introduction

The management of external relationships is a critical component of national development policy for all small states. This chapter illustrates the growing range and complexity of external linkages in support of the development of education services. It comments on the implications and consequences of these linkages for planning and management.

Attention is focused on the educational systems of countries which belong to the Commonwealth. The Commonwealth association has a total membership of 50 fully independent states. Of these, 23 have a population of under one million; 18 are in the Caribbean and the South Pacific. In addition, there are 11 associated states or dependent territories which in total have a population of under 150,000. Together these 34 states make up a sizeable proportion of the 71 countries or 'territorial units' listed in the UNESCO Statistical Yearbook as having a population of under one million. This chapter draws in particular on the outcomes and conclusions of activities being undertaken by the Commonwealth Secretariat within its work programme on educational development in the small states of the Commonwealth.

2. A complex of external relationships

The pattern of external relationships and linkages in support of national educational development is much more complex than the actual structure and organisation of education systems in small states. By and large the smaller the country the simpler the system. In Anguilla (population 7,000)in 1990 there were 198 students in pre-school, 1,300 in 6 primary schools and 900 in 1 comprehensive school.

In Barbados (population 255,000) the total professional and administrative staff of the Ministry of Education is 161, working in 14 units. Most countries have one major tertiary educational institution (excluding the campuses of regional universities like the University of the West Indies; Jenkins (Chapter VI) or the University of South Pacific discussed in Chapter VIII). However, to maintain and develop small national systems, and to provide education and training opportunities, which by virtue of smallness of scale cannot be provided nationally, requires an increasingly complex network of relationships for funding, staff, equipment and materials, institutional development, scholarships and fellowships, examinations and staff training. For independent countries the complexity is increased as the link with the former colonial power weakens. New actors have come onto the scene for geo-political reasons, whilst small states are becoming more adept at playing the field and selecting different partners for different educational ventures. This is not to deny the significance and complexity of educational dependence and interdependence in much larger countries but for small developing nation states of the Commonwealth, external linkages, in a variety of guises, are a central component, implicit or explicit, of national educational policy. By way of illustration, three significant elements of the educational interdependence and dependence are outlined below: (a) the development of secondary school examinations; (b) the provision of post-secondary education and training opportunities; and (c) the provision of bilateral and multilateral aid for national education systems.

(a) Examinations

Small states are faced with a difficult balancing act; how to develop a school curriculum and associated examinations which have national integrity and relevance whilst ensuring that international credibility and opportunities for mobility are not forfeited. Whilst even the smallest states have instituted their own primary leaving examinations, the examinations issue is a particularly thorny problem at the secondary level.

Commonwealth small states exhibit a variety of responses, all of which are in a state of flux. For some, especially countries such as Maldives and Seychelles, which are not part of strong regional groupings, the maintenance of linkages with metropolitan examination boards seems to offer the most cost-effective options. However, as radical changes take place in British examinations practice, this may not be a long-term solution. One country, Vanuatu, has been discussing internally the possibility of following the International Baccalaureat.

In the English speaking Caribbean a regional solution has evolved. The Caribbean Examinations Council (CXC) was established in 1972. It now serves 14 territories. It was created in order that Caribbean children could sit locally-set examinations and follow syllabuses developed by Caribbean educators. At the same time, it is charged with ensuring that examinations are of a standard deserving of regional and international recognition.

In 1990 nearly 70,000 candidates sat CXC examinations at the basic, general and technical efficiency levels. This represents a 'capture' of approximately 90 per cent of the market originally held by the London and Cambridge examination boards. Work is currently under way to introduce syllabuses and examinations in the 11 subjects for the Post-Caribbean Secondary Education Certificate in 1996, thereby reducing the British ties still further.

The professional development of CXC has been impressive. Its difficulties, as with so many programmes of regional co-operation, are financial. The Council is funded by a mix of candidate and subject fees and government subventions. In has struggled to match operational costs and income and is currently negotiating with governments for an increase in fee levels and government support.

In the other major grouping of small states in the Commonwealth, in the South Pacific, the pattern is more diverse. The trend is towards the establishment of national certificates in the fourth and fifth forms of secondary schools and more recently to establish a regional form six examination for a small group of countries. Both elements are being facilitated by the work of the South Pacific Board for Educational Assistance (SPBEA) which is based in Fiji, with a membership of nine South Pacific countries, plus the University of the South Pacific, and which is supported by Australia, New Zealand, the United Kingdom, UNDP/UNESCO and the Commonwealth Fund for Technical Co-operation (CFTC). The Board was established in the early 1980s to provide technical expertise and training to enable Member Countries to develop national assessment and examination capabilities. However, in the last few years, and with the demise of the New Zealand School Certificate examination, SPBEA has been instrumental in establishing a Pacific Senior Secondary Certificate for four countries – Kiribati, Solomon Islands, Tonga and Western Samoa. There were 1,198 candidates sitting 5,400 examinations in 1989, the first year in which the new examination was set. This examination is now recognised as a sixth form qualification within the region and in Australia and New Zealand.

Thus small states whilst wishing to ensure greater national control over their educational offerings are recognizing that collaborative ventures and interdependence in an area such as curriculum and examination development is a practical way forward.

(b) Post-secondary education and training

This is probably the most significant, difficult and contentious issue currently confronting small national systems of education in the developing countries of the Commonwealth. It is at the post-school level that the impact of smallness of scale is greatest. Small states cannot aim to provide the range of opportunity which larger systems of education are able to offer. At the same time, there is a national determination that citizens of small states should not be denied access to further education, either nationally or in other countries. So there is a combined and related search to enhance and diversify national provision and to develop a broad range of flexible linkages with educational partners at the sub-regional, regional and international levels.

The concern for improving national provision is being met very largely by the concentration of post-secondary education and training in tertiary or community colleges. These colleges are charged with offering higher education, professional and vocational training and community outreach programmes. A sample of examples include:

	Date of establishment
Barbados Community College	1968
College of the Bahamas	1974
Antigua State College	1977
The Gambia College	1979
Clifton Dupigny Community College (Dominica)	1982
Seychelles Polytechnic	1983
Solomon Islands College of Higher Education	1985
Sir Arthur Lewis Community College (St. Lucia)	1986
St. Kitts and Nevis College of Further Education	1988
Tonga Community Development and Training Centre	1988
Grenada State College	1988
British Virgin Islands Community College	1990

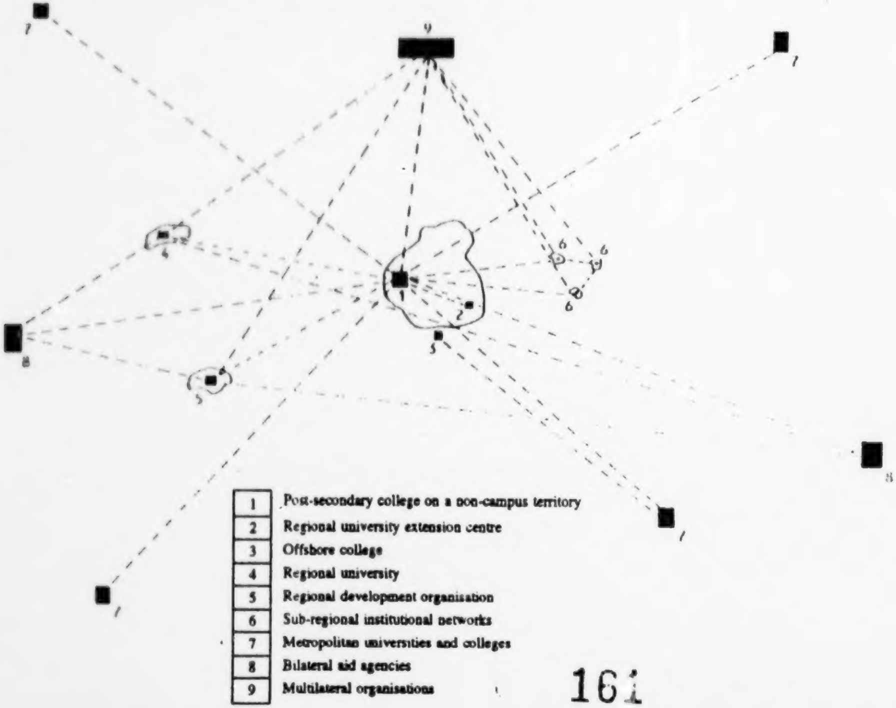
The concern to diversify linkages and co-operative arrangements takes many forms. *Figure 1* attempts to highlight some of these complex arrangements with a South Pacific or Caribbean non-university campus country at the heart of the diagram.

No attempt is made here to explore all these linkages. Instead brief attention is paid to three significant issues in the development of co-operative arrangements:

(i) The role of the regional university.
(ii) New forms of regional and sub-regional co-operation.
(iii) Institutional links with metropolitan/rim countries.

The regional university is a major and continuing achievement of small state co-operation. The University of the West Indies (UWI), created in 1949, is supported by 14 independent states and dependent territories, and serves other countries in its region, most notably Guyana. The University of the South Pacific, established in 1968 serves 11 countries. A third regional university, the University of Botswana, Lesotho and Swaziland has been divided into separate national components although strong programmes of co-operation remain.

Figure 1. Post-secondary education: patterns of networks and links (Caribbean and South Pacific)


9
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1 Post-secondary college on a non-campus territory
2 Regional university extension centre
3 Offshore college
4 Regional university
5 Regional development organisation
6 Sub-regional institutional networks
7 Metropolitan universities and colleges
8 Bilateral aid agencies
9 Multilateral organisations

Both the regional universities are having to re-assess their roles. Two recent observations highlight the factors involved.

> "...regional solutions to national problems are less popular than a decade ago, not to the extent of neglecting regional facilities, but of insisting on more national-based facilities. The biggest problem with regional solutions has been the equitable distribution of benefits and costs. Countries which are not headquarters to such institutions have come increasingly to the conclusion that the headquarters country is the beneficiary and that others are progressively marginalised. Thus they look increasingly to national or bilateral solutions."
>
> *Crocombe; Meleisea (1988) p. 427.*

> "The situation is now rapidly changing as these countries [the Member Countries of the University] realise that many of the needs that they have expected UWI to fill in the past might eventually be filled more economically and more appropriately by a tertiary institution ... or perhaps by a sub-regional programme ... These developments point to the need to re-assess the University's role within the total education system in the region, particularly with respect to its relationship with these emerging tertiary institutions, and the balance of its own programmes, including the relative emphasis to be placed on undergraduate and post-graduate work."
>
> *Loubser et al., 1988.*

The articulation of the regional/national relationships will occupy a central place in the development of both regional universities for some years to come. UWI has had Offices of University Services to provide links with non-campus countries for some years now. More recently it has established an Association of Tertiary Level Institutions charged with strengthening co-operation among tertiary institutions and the University. The Association gives special consideration to questions of access and the articulation of accreditation arrangements including associate degree recognition.

In the South Pacific, the Vice-Chancellor of USP is quoted as saying :

"It [USP] was set up to do for each of its member countries those of their educational tasks which cannot effectively or economically be done nationally, and on a small scale. I hope national institutions like the Solomon Islands College of Higher Education, the National University of Samoa and the Fiji Institute of Technology, will continue to develop and free the resources of USP to do the work, at degree, and increasingly, at the post-graduate level which only we can do. At present our development is hampered by the very pressing need for us to continue to fill the gaps at sub-degree level in national educational provisions, with the result that much of the more advanced work continues to be done at overseas universities, often less appropriately. But this cannot be achieved unless more resources can be invested by national governments in national institutions without, of course, reducing their investment in their own regional institution. That is the way we should be going, but it will be hard."

Caston (1989) pp. 51-53.

As these shifts and balances take place between regional universities and national tertiary institutions so new forms of regional and sub-regional co-operation are emerging. The old forms of externally imposed regionalism are being replaced by much more pragmatic links and networks. It may take the form of bilateral arrangements whereby, for example, Mauritian teachers serve in the Seychelles and Vanuatu. Or it may involve sub-regional networks.

The Consortium on Pacific Education (COPE) links American Samoa and Tonga and is assisted by the Pacific International Centre for Higher Technology Research (funded by the USA and Japan). The focus of the Consortium's work is to network the post-secondary institutions of the three countries.

Agreement has been reached that Tonga should be the sub-regional centre for maritime studies, American Samoa for computers and Western Samoa for mathematics and science. The Organisation of Eastern Caribbean States (OECS) is also seeking to help rationalise scarce institutional resources by developing centres of excellence in selected post-secondary colleges. Thus Antigua State College focuses on business education; Sir Arthur Lewis Community College in St. Lucia on Technical Teacher Training. OECS is also assisting in the co-ordination of aid requests and projects at the post-secondary level.

Reference has already been made to CXC and SPBEA. The Caribbean Community (CARICOM) serves a regional role in some areas of education policy and has sought, for example, to develop greater co-ordination and rationalisation in the provision of technical and vocational education and training, through a regional action plan.

Region associations for educators offer another avenue for co-operative endeavour. For example CATVET (Caribbean Association for Technical, Vocational Education and Training) brings together senior professional staff from post-secondary institutions for information sharing and professional development. There are similar fora for teacher's unions and adult educators. Whilst these regional initiatives grow so do new and diverse arrangements as well with institutions in metropolitan/rim countries.

Two examples of this trend are noted: institutional links between national post-secondary colleges and colleges in developed countries; and proprietary medical colleges, a phenomenon particularly apparent but not exclusive to the Caribbean.

The Sir Arthur Lewis Community College (SALCC) in St. Lucia has developed strong links with St. Lawrence College in Canada with support from Canada and CIDA through the international programme of the Association of Canadian Community Colleges (ACCC). The intention of this association is institution-building at both ends of the link. For SALCC it means visits by students and staff, assistance in the development and teaching of new courses and the training of college staff. Seychelles Polytechnic has developed a strong link with the School of Education at the University of Sussex for the training and professional development of its teachers to B.Ed. level. The Seychelles Government chose Sussex after a thorough tendering procedure. Gambia College has a similar link with Bristol University. It seems likely that these bilateral linkages will increasingly include the possibility of more national post-secondary institution students moving on to higher education programmes in metropolitan institutions and the threat this may pose for regional institutions.

A very different sort of relationship arises out of the growth of the proprietary medical schools. For example, and as has been highlighted by Leventhal (1990), there are or have been seven such schools in the Eastern Caribbean (in Antigua and Barbuda, Dominica, Grenada, Montserrat, St. Kitts and Nevis, St. Lucia and St. Vincent and the

Grenadines). These colleges were established from early 1970s onwards to meet an unmet American demand for medical education. On the face of it they are irrelevant to domestic development. Leventhal argues that in the case of Grenada and the St. Georges University the international trade in educational services has had a significant impact on the economy of Grenada. He also suggests that:

> "if present trends continue it will not be long before most registering physicians are locally educated at no cost to Grenada [an average of 5.5 scholarships a year since 1978]."
>
> *Levanthal, 1990.*

The preceding paragraphs have attempted to suggest that patterns of linkages and co-operation at the post-school level are becoming more and more complex, with a growing number of actors, each having slightly different agendas – national and regional, developmental and geo-political. However, the dominant element in the demand of even the smallest state is to extend the range of educational opportunity for its citizens even if its own educational capacity is limited by smallness of scale.

(c) *Educational aid*

The varied forms of educational co-operation and linkages referred to above depend in large or small measure on educational aid. By world standards the total level of resources is small. In 1985/86 Australia spent A$20.4 million on educational assistance to the countries of the South Pacific. At a recent donors co-ordinating conference for Tuvalu (population 8,000) the amount requested for restructuring one of the smallest educational systems in the world was A$3 million over three years.

Whilst the overall amounts may be small the diverse contribution of external assistance to national education may be considerable as Luteru (Chapter X) indicates. The education project list for Western Samoa in 1987 is itemised below:

Nature of project	Source of funds	Expenditure US$
Commonwealth Fellowship	Australia	23 722
In Australian Training	Australia	26 927
ITI Training	Australia	64 199
Junior Secondary Curriculum Dev.	Australia	23 118
Primary Curriculum Evaluation	Australia	11 175
Private Overseas Student Subsidy	Australia	27 215
Students in Australia	Australia	222 705
Technical Institute Study	Australia	217 494
Third Country Training	Australia	18 007
USP Third Country Training	Australia	65 589
Visa Charges	Australia	99 574
ACIAR Special Awards	Australia	535
Voca. Second. Curriculum Project	Australia	19 444
WA Government - TAFE	Australia	4 556
B.Ed. (Industrial Arts)	CFTC	22 653
B.Sc. (Maths)	CFTC	22 653
Volunteer Service	Japan	234 997
National Examination System	New Zealand	6 579
South Pacific Sixth Form Exam.	New Zealand	7 895
Technical Education	New Zealand	23 026
Strengthening Technical Institute	UNDP	23 214
UNVs for Education Department	UNDP	166 148
Environmental Curriculum Dev.	UNDP	7 000
Workshop on Educational Technology	UNESCO	10 000
Attachment/Internship	UNESCO	3 500
Degree in Physical Education	UNESCO	2 500
IIEP Fellowship	UNESCO	15 000
Meeting on Co-op/Education Planning	UNESCO	4 000
Reading Materials/Textbook Production	UNESCO	2 500
5th Education Advisory Committee	UNESCO	4 000
EMIS Training Workshop	UNESCO	4 000
Nutrition Education Conference	UNESCO	1 000
Low-cost Science Material	UNESCO	500
Science for All Workshop	UNESCO	1 800
Seminar on Continuing Education	UNESCO	2 000
Training in Book Publishing	UNESCO	n.a.
Examiners' Training Course	UNESCO	3 000
Seminar on Non-formal Education	UNESCO	1 000
Training Primary Educ. Personnel	UNESCO	2 000
Review of Teachers' Development	UNESCO	2 000
UNVs for Ed. Dept. (supplementary)	UNV	6 240
Technical Institute	UNV	6 442
Educational Facilities & Technology	USA	308 000
Education Policy	USA	308 000

Source: United Nations Development Programme, Apia.

The sums of money involved are small (US$334,997 from Japan being the single largest figure) but the number of projects – 44 – is a sizeable number to manage. In the Western Samoa case the number of agencies involved is relatively small. In the case of the Seychelles, a more isolated country with a different geo-political context, at least 18 donor countries contribute to national educational development – from Cuba to China, from Belgium to Nigeria.

Some small states face a problem which from the table above may not be a concern for Western Samoa; the unwillingness of donors/lenders to prepare and fund very small projects. In such circumstances a small state may find itself over-burdened with large education projects which severely stretch national absorptive capacity or education projects may have to be linked, sometimes artificially, in larger multi-sectoral projects.

While remaining heavily dependent on external assistance within and beyond regions such as the Caribbean and the South Pacific, criticisms of the education aid policies are being voiced. Some of these were aired at a meeting on education development in small states in Mauritius in 1985. They included:

- a tendency for agencies to treat small states as scaled down versions of large countries, requiring masses of detail and lengthy procedures;
- small states often face the task of developing projects with a number of components funded by different agencies with different planning and reporting requirements;
- some aid projects are tied to overseas institutions when regional or national ones could do the job;
- a large proportion of funding may find its way back to the donor country, rather than supporting local expertise or the purchase of local goods and services;
- small states lack a good data base on donors and institutions, Commonwealth Secretariat, (1986).

These difficulties and criticisms are not peculiar to small states but the implications of these difficulties for education systems highly dependent on external linkages are significant. Higginson, (1987) referring specifically to multilateral assistance in the South Pacific, argues for:

"a less wooden, more understanding approach to co-operation on the part of the donors, and an increased application on the part of the recipient that scarce resources wasted are scarce resources deprived from the needy." *Higginson (1987) pp. 164.*

He argues for project support that utilizes regional expertise and which is grounded in the use of national co-ordinators who have the opportunity to interact. Projects need to take account of the mercurial nature of staffing and programmes, and depending on the level of the project, take careful account of local language requirements.

Efforts to co-ordinate the roles and contributions of different agencies have not been notably successful although the co-ordinating donors conference may hold out some hope in this respect.

3. The planning and management of external linkages

The preceding sections have sought to illustrate the significance and the growing complexity of external linkages; linkages which are critical components of national educational development in small, national systems of education.

The planning and management of these external linkages presents a series of difficult challenges for small ministries of education which in most instances lack the departmental specialization characteristic of ministries in larger countries. In some small states, there is no separate and distinctive planning unit. Planning is a function in which all senior members of the ministry are involved, implicity or explicity. In many other systems there may be one or two officers designated as having a planning function. In reality their main preoccupation is likely to be the collection and dissemination of data for administrative and record purposes rather than the strategic needs of educational planning.

Difficulties which arise from the planning and management of external linkages include:

(a) The problem of recording external assistance linkages and service, within a broad planning framework.

(b) The need for skills particular to the process of external dialogue, consultation and negotiation.

(c) The heavy burden of time which the management of external relationships places on small ministries.

(d) The problem of how to accommodate the management of external relationships for ministries organised and structured to manage school systems.

(a) Co-ordination

Prior to the independence of small states from colonial rule there was heavy and almost total dependence on the metropolitan power for externally provided services. There was one central external relationship. Independence has brought greater freedom of choice but it has complicated the planning and management process. Volunteer teachers, textbooks, examinations, scholarships, training courses may well come from different sources, requiring different lead times for planning, different negotiating and accountability procedures.

Allied to this complexity is the vulnerability of the small states to supply-led education services; to institutions in metropolitan countries seeking educational business; to institutions with packages to market; to agencies wanting to push projects which are not the priority in a specific state. Baba (1989) has talked recently of the sale of education in the South Pacific; education as a commodity at the market price.

Whilst there is nothing amiss in selling a good product the capacity of small systems to make sound judgements on strongly marketed educational products is a problem.

(b) Skills

The majority of personnel in ministries of education have graduated through the school system. An officer in charge of secondary or primary education or curriculum development may have had exposure to pedagogical professional training opportunities, and possibly, some administration and management programmes. However senior and not so senior officers are expected to design projects, enter into negotiating activities, represent their country in regional council and management boards as well as manage national school systems. This requires knowledge and skills for which there are virtually no professional development opportunities.

(c) Time

The time implication for the management of external relationships are considerable. Here are some observations from senior officers in one of the larger Commonwealth Caribbean countries. First on aid:

> "Interaction with aid donor agencies creates enormous difficulties and pressures on the Ministry of Education. The data requirements and preparation of projects can take up large volumes of administrative time ... the varying data requirements and project formats create the necessity for repetitive work. The varying reporting and monitoring formats of the aid donor agencies, particularly in circumstances of an already overstretched managerial team in the Ministry creates a counter-productive treadmill in which education managers are so preoccupied with meeting reporting schedules that they have little time for actual execution. What is even more damaging is that the amount of time spent in implementing foreign projects as opposed to routine and locally-funded activity, is often not commensurate with their importance. This distortion of managerial time has a cyclical effect since very often it causes deterioration in the basic management of the Ministry, creating the need for more external assistance."
>
> *Barnard; Dash; Maruiton (1990) p. 133.*

On information:

> "A very rough analysis of the time spent responding to requests outside the country suggest about nine man months on that activity alone." *(Ibid).*

Overseas linkages also require considerable periods of absence especially in support of the management of regional organisations and institutions such as examination councils and regional universities. The management of absence is a difficult but necessary art in small ministries.

(d) Management responses

It is rare that the range of externally related management tasks is conceived as the responsibility of particular units or departments. Most small state systems cannot afford such luxury. The Gambia has an Under-Secretary as the manager of external projects, the Solomon Islands has a Training and Manpower Division handling a range of overseas linkages and Kiribati asks its planning units to deal with regional organisations.

However, a more common approach is that adopted by St. Lucia:

> "As a general rule the Ministry tries to assign a middle level of senior staff members to every project which is funded by external donors. ... UNICEF projects, for example are co-ordinated by the Education Officer (Pre-School); OAS projects in Adult Education are co-ordinated by the Education Officer (Adult Education); the Chief Education Officer serves as National Co-ordinator for CARNEID/Caribbean Network of Education Innovation for Development." *Frederick (1990) p. 154.*

It is not being argued that questions of co-ordination, special skills, time management and ministry organisation do not arise in managing external relations in large countries. What has to be underlined is that the small system, drawing on a limited cadre of personnel, faces particular challenges in getting the best out of a diversity of links and interdependent relationships.

4. Ways forward?

The paradox for small systems of education is that the search for increased self-reliance and control over the provision of education is resulting in the establishment of a more complex set of external relationships. A narrow colonial dependence has gone even for countries which continue in a dependent relationship. The change from colonial times is the determination of small states to have greater influence over the links and relationships which they want. The difficulty in achieving this authority is economic, strategic and cultural vulnerability. They are also trying to achieve greater self-reliance at a time when the international education market-place is becoming more commercial and more competitive. Some modest advances in support of small systems of education in their management of external relationships would include:

- A new look on the part of external aid agencies in their approach to assistance for small systems.

- Professional development programmes (within country or outside it) that promote management skills more closely related to the culture and realities of small ministries.

- The development of data package based on agency procedures, overseas courses, scholarships and bursary awards. The potential of information technology to link the small state with the wider educational world is considerable.

- Support to enhance the capacity of regional institutions to support national educational development. Insufficient use is being made of indigenous small expertise.

Chapter X
Aid and education in small systems: a South Pacific perspective

by Pao H. Luteru

1. Introduction

The traditional links between development, aid and education remain strong in the Pacific Island Countries (PICs), although these may not have been well enunciated in the past. When one speaks of development in the PICs there is inevitably reference to aid as a crucial facilitator in that process. This is because of the PICs' heavy dependence on aid resources to finance the bulk of development activities. The situation is exacerbated by the PICs' poor economic base, small population and land sizes, vulnerability to fluctuating world primary commodity prices, dispersion over vast expanses or ocean, and isolation from major world markets.

In the development literature it is now widely accepted that it is the human resources of a nation, not its raw materials or capital, that ultimately determine and shape the pattern, rate and character of that nation's economic, social and political development. In the context of the PICs very little analysis has been attempted in this area until the 1980s Brock; Smawfield, (1988). However, despite the substantial flow of both domestic and external resources to the education sector in the PICs, the results have been disappointing. The need to channel scarce resources to those areas in the education sector where the greatest development impact is likely to occur requires more careful planning by not only the PICs but also the aid community.

This chapter is divided into two sections and seeks to explore this question further, highlighting the influence Australian and New Zealand aid has had on shaping educational development in the PICs. *Section I* deals with the general issues of development, education and aid in the context of the PICs. In Section II the discussion will focus on how aid has contributed to or hindered educational development in the Pacific. In particular this chapter discusses how size, population, culture, language, economic factors, isolation and the collective importance of the PICs to donor countries' political, economic and strategic goals affect the pattern and direction of educational development in the Pacific.

I. Pacific Island Countries development

The PICs are heavily dependent on imported goods and services. Tuvalu's import bill in 1984, for example, was roughly 162 per cent of the country's GDP. On the export side, the PICs have tended to rely on only a few commodities as foreign exchange earners. Primary products such as cocoa, fish and seafood, copra, sugar and timber form the PICs export commodity base. With the exception of Fiji, and possibly the Solomon Islands, mining has very limited potential as a future earner of foreign exchange.

1. Exports

In the area of trade, a number of trends are worth noting. *First* there appears to be a close relationship between the major destination of the PICs exports and their colonial and historical ties. For example, from 1970-1984, Fiji received on average about a third of its total export earnings from its former colonial power, the United Kingdom. A similar situation exists in the case of Western Samoa and Cook Island with their former colonial power, New Zealand.

Second, despite the close proximity of Australia and New Zealand to the PICs, and the creation of a number of favourable trade instruments to encourage the flow of exports to these countries, they are not major importers of the PICs commodities except for New Zealand in the case of Western Samoa and the Cook Islands.

Third, there has been the emergence of Asian countries, especially Japan, as a viable and potentially attractive alternative to western markets for the PICs' exports. Finally, the role of the PICs themselves as future markets needs to be fully assessed.

It is also clear that the PICs in the foreseeable future will continue to rely on primary agricultural products as the foundation of their export efforts, thus maintaining their vulnerability to fluctuations in world primary commodity prices. There is also a push by the PICs in the last ten years towards more involvement in the processing of basic agricultural commodities. Opportunities for diversification of export commodities differ between countries but the atoll micro-states are clearly at a disadvantage compared with their larger neighbours.

2. *Imports*

The principal exporter of goods and services to the PICs is Australia (see *Table 1*). However, Australia's share in the total import portfolio of these countries has been declining steadily. For example, in 1979 Kiribati obtained 58 per cent of its import requirements from Australia but by 1985 this figure had dropped to 39 per cent. Similarly, Tuvalu's import bill from Australia in 1980 was 48 per cent of its total needs, declining to 31 per cent in 1985. Except in the case of Western Samoa and the Cook Islands, there appears to be little relationship between the flow of imports from source and former colonial ties of the PICs. What is more apparent is the link which exists between the source and its proximity to the destination for such goods and services. Freight costs, familiarity with such goods and services as well as other financial considerations appear to be the major determinants and explain why Australia, New Zealand, Asian countries and other the PICs are the major sources of imports to the PICs.

In brief, trade routes for the island countries follow those established for foreign aid, although the net direction of resource flows differs.

Tourism has potential for the PICs' development but there still exist reservations about the balance between the economic gains of such activity and the potential for social and cultural disruption.

Table 1. Source of the PICs imports (average in percentage)

	Fiji 1970-84 %	Kiribati 1979-85 %	Tuvalu 1980-85 %	Vanuatu 1982-87 %	W. Samoa 1970-87 %
Australia	31	48	38	35	20
United Kingdom	11	5	5	*	4
North America	4	8	*	*	10
New Zealand	14	7	11	11	31
Japan	16	15	3	13	11
Asia	16	5	*	8	12
PICs	*	10	36	11	6
EEC	3	1	*	8	3
Others	5	1	7	14	3

Sources: Various Pacific Island Countries Development Plans.
Note: * = negligible.

Because of the small size of their domestic markets, remoteness from main world markets, and the fragmented and dispersed nature of the population, the PICs producers find it difficult to sustain capital accumulation. These factors have also contributed to making imports much more expensive and a heavy drain on much needed foreign exchange.

One of the most striking but least understood features of the PICs is their diversity, not only between countries but also within them. This diversity manifests itself in the demographic, geographic, and economic profiles of these countries. For instance, the average *per capita* income of the PICs in 1987 was approximately US$1,890. However this masks the large variations in GNP *per capita* which exist between these countries. Nauru, the wealthiest, has a *per capita* income (US$10,230) which is 24 times greater than that of the Solomon Islands; OECD (1989). In the area of language the Polynesian countries exhibit a common linguistic heritage while the Melanesian countries, especially

Vanuatu and the Solomon Islands, have well over 200 distinct languages Teasdale; Murphy (1989).

One of the main differences which exists between the PICs lies in their resource endowment and in the degree to which their economies have been distorted by outside forces such as aid, remittances, and other forms of foreign investment. In an attempt to classify the PICs according to their degree of economic independence, and their potential for achieving such a goal, the Forum Secretariat, formerly *South Pacific Bureau for Economic Co-operation* (SPEC), and the *Australian International Development Assistance Bureau* (AIDAB) arrived at the following groupings:

Group 1: Self-sufficiency and growth model

This group consists of Fiji, Solomon Islands and Vanuatu. Fiji is already capable of achieving economic independence, minimum aid dependence and the prospect of growth in a number of sectors. The other two countries have good prospects of raising income, because of their large undeveloped natural resource base, to a level where they can stand independent of aid if appropriate policies are adopted.

Group 2: Micro-state model

Comprises four countries; Cook Islands, Kiribati, Niue, and Tuvalu. Two of these countries have achieved some measure of economic independence through the establishment of trust funds. In the case of Kiribati, the Revenue Equalisation Reserve Fund was established from royalties earned from phosphate mining in the country (which ended in 1979). The Fund currently stands at about A$180 million. The *Tuvalu Trust Fund* is smaller (about A$30 million) but the principle is the same: the interest earned has been utilised to off-set shortfalls in the recurrent budget. This type of initiative is perhaps indicative of the direction and form future assistance should take in an effort to lessen the dependence of the PICs on annual aid allocations.

The Cook Islands and Niue are heavily dependent on aid, especially from New Zealand, for their survival and are amongst the most aided countries in the world. For instance, in 1985 each Niuean received SDRs1,750 and Cook Islander SDRs500 from all aid sources Australian

IDAB (1987). Because of their extremely small population and land areas it is virtually impossible for countries in this group to substantially increase income through domestic production.

Group 3: Subsistence affluent model

Included in this category are Tonga and Western Samoa. The natural resources of these countries are adequate to sustain more than minimum subsistence, but possibly not to aspired levels. These countries are also characterized by their heavy dependence on overseas remittances. In 1988, for example, Western Samoa received US$73.8 million from remittances compared with US$31.5 million in exports from all other sources. Remittances represented two thirds of the country's total income for that year Pacific Islands Monthly (1989).

Group 4: Expiring boom state model

Only phosphate rich Nauru belongs to this group. If appropriate investment policies are pursued, Nauru would have no future need for external assistance.

It should be pointed out that the above classification of the PICs is just one model which could be applied and is based on an orthodox development theory which is dominant in donor countries. What is more important to note is that because of the differences which exist amongst the PICs the solutions to the development problems of one will not necessarily be applicable if transplanted to solve the development ills of another.

An examination of the development plans of the PICs reveals that, without exception, all aspire to economic development and self-reliance as their top priority. This self-reliance aspiration is perceived mainly by the PICs as a:

> "... situation where the economy is able to meet its import requirements from foreign exchange earnings, meet the larger portion of recurrent expenses from domestic revenues, make some contribution towards the development budget, and meet manpower requirements from the domestic labour force."
>
> *Vanuatu Government, 1989.*

Realistically, it is difficult to envisage any PICs achieving such goals. But while there is an obvious and strong emphasis on economic development as the preferred road to overall development, the PICs are not blind to other considerations. For instance, there is a strong desire to ensure that economic, social and cultural development go hand-in-hand in a balanced and harmonious manner and that the benefits of development are shared widely amongst the community.

Thus, given their economic bases, some PICs will find it extremely difficult to cope with ever increasing needs unless they can obtain some outside assistance. One such form of assistance is overseas remittances. Overseas remittances for some PICs are extremely vital to the health of their economy. The Polynesian countries appear to benefit most from these financial transfers. For instance, remittances helped to finance 14 per cent of the Cook Islands' total import bill between 1970 and 1983, about 20 per cent of Tuvalu's between 1979 and 1982, and 13 per cent of Kiribati import requirements since 1979 (Ogden, 1989).

Besides the economic benefits of remittances, emigration for the PICs also serves another useful purpose: to act as a demographic safety valve. However, as with tourism, the debate on the positive and negative effects of overseas remittances is far from being resolved Kritz; Keely; Tomasi (1981); Ussell (1986). The central issue appears to concern the effective utilization of these funds without adding further pressures to the fragile and already weak balance of payments of these countries. But there are also important policy implications for educational development in the Pacific especially for those countries who benefited most from this type of resource flow.

3. *Development strategies*

A scrutiny of the utilization of local resources within various sectors of the PICs economies reveals a number of interesting trends. Between the late 1970s and 1980s the social services sector consumed by far the largest proportion of individual PIC government recurrent expenditure, followed by administrative and other support activities. The economic development sector was ranked fourth in terms of priority for the PICs government resources. The pattern of aid resource flow was almost the opposite to that for domestic resources. Capital intensive projects in the infrastructure and economic sectors attracted top priority for aid funding.

These observed trends in both domestic and external resource allocation appear to be in tune with the policies of donors and the PICs. The former seek to tie their assistance to goods and services available in their own countries. In contrast, the PICs more immediate political considerations have had the effect of local resources being channelled to education, health services, and the administrative apparatus of island governments.

All the PICs aspire to high economic growth for the attainment of self-reliance. As such, economic activities geared towards generating revenue are accorded very high priority. On the surface this policy does not appear to be congruent with governments' allocation of both domestic and external resources, as shown in *Tables 2 and 3*. However, it has been argued by the PICs governments, and accepted by the aid community, that a necessary condition for economic development has been the need to put in place the required infrastructure to enable development to proceed. The fragmented and dispersed nature of the PICs also demands that adequate and appropriate transport and communication infrastructures be put in place.

Table 2. Sectors of local resource concentration (distribution in percentage)

	Cook Is. 1977-83 %	Fiji 1979-89 %	Kiribati 1979-89 %	Vanuatu 1981-86 %	W. Samoa 1975-88 %
Infrastructure	9	18	23	16	15
Economic devel.	11	10	9	7	5
Social devel.	31	27	38	42	41
Administrative and other support services	42	18	30	27	29
Others including debt servicing	7	27	0	8	10

Sources: Various Pacific Island Countries Development Plans. Recurrent estimates and other official documents.

Table 3. Sectors of aid concentration (in percentage)

	Cook Is. 1981-88 %	Fiji 1983-88 %	Kiribati 1979-84 %	Tuvalu 1981-88 %	Vanuatu 1982-86 %	W. Samoa 1977-88 %
Infrastructure	33	13	40	56	16	50
Economic development	23	30	18	19	54	41
Social development	30	10	24	25	20	8
Administrative and other support services	9	47	18	-	10	-
Others including debt servicing	5	-	-	-	-	1

Sources: Various Pacific Island Countries Development Plans. Recurrent estimates and other official documents.

4. *Aid to the PICs*

External resources are a key element in the drive by the PICs towards economic development. With the exception of Fiji they are heavily dependent on aid to finance their development efforts, and will continue to be so in the foreseeable future.

The major sources of external funds to the PICs have remained fairly constant throughout the last 15 years, although there has been a noticeable increase in the number of donors involved and a corresponding decrease in the dominance of any one donor. Bilateral aid is by far the most dominant type of aid channelled into the PICs and accounts for the bulk of total Pacific external resource flows. Nevertheless, the influence of multilateral agencies has been growing over the last decade.

The flow of aid to the PICs has been influenced primarily by earlier historical ties, although evidence now shows this influence to be waning. It is also of interest to note that, given the current trend in both the direction and volume of aid flows to the PICs, it would be fair to conclude that these countries will increasingly look towards non-English speaking nations as an alternative source of aid in the future.

To date, Australia, New Zealand and the United Kingdom remain the major bilateral donors to the region. In the multilateral sphere, the EEC and UN agencies are the major donors (see *Table 4*). In real terms, aid to the PICs from their traditional donors has been declining since the early 1980s. However, a corresponding increase in the number of donors willing to assist the region has contributed to buffering the effect of this decrease.

On a *per capita* basis, the PICs are the most aided in the world. This has led to some of these countries developing highly sophisticated aid recipient skills Luteru; Ryan; Teasdale (in press). But this large flow of aid (see *Table 5*) has also contributed to fostering a dependency mentality within the PICs and reduces the desire for self-help and initiatives.

While there is a general acceptance amongst the PICs governments of the important role that aid plays in the development process, they are also concerned with the unwelcome effects of aid. The *Kiribati Sixth Development Plan* Kiribati Government (1988) is representative of such concern in its strong declaration that " ... only that assistance which contributes to the development goals without mortgaging the strengths and resources of our country will be accepted". The need to ensure that aid resources are well utilised is also evident in the PICs government policies. According to the Western Samoa Development Plan, Western Samoa Government (1984), it is essential that efforts " ... be made to ensure that aid flows into key development areas".

Table 4. Major sources of external development funds (average in percentage)

	Fiji 1979-82 %	Kiribati 1979-87 %	Tuvalu 1984-87 %	Vanuatu 1982-87 %	W. Samoa 1980-87 %
Bilateral donors					
Australia	55	18	17	19	31
Canada	-	-	2	2	-
France	-	-	-	17	-
Japan	3	15	1	-	19
Netherlands	-	-	-	-	1
New Zealand	27	5	14	8	24
United kingdom	-	41	44	30	-
West Germany	-	-	-	-	7
Multilateral donors					
ADB	-	2	-	-	-
CFTC	-	-	2	-	-
EEC/EDF	8	9	6	14	11
UN/UNDP	7	-	6	-	5
Others	-	10	8	10	2

Sources: Various Pacific Island Countries Development Plans and other official documents.

Table 5. Total ODA to the PICs from all sources: aid per person (US$)

Country	Global aid 1988 US$	Australian aid 1987-88 US$	New Zealand aid 1987-88 US$
Cook Islands	706	-	502
Fiji	75	22	4
Kiribati	242	26	26
Niue	1 667	-	1 856
Solomon Islands	198	27	5
Tonga	192	61	29
Tuvalu	1 750	540	480
Vanuatu	260	60	12
W. Samoa	187	42	24

Sources: OECD, 1989: 239: NCDS, Pacific Economic Bulletin, 1989. World Bank, 1989: 230.

Note: The high figure for Tuvalu should be treated with caution because of the effect of the Trust Fund attracting large amounts of aid resources in 1987 and 1988. The average figure for Tuvalu during the 1980s would be around US$500 per person.

5. Donors' motives

The primary stated objective for global aid-giving is based on altruistic motives, although donors' self-interests are also acknowledged. Australian and New Zealand motives for giving aid are no different although the emphasis between their various interests may differ. For instance, the principal objective of the Australian aid programme is given as the promotion of " ... economic and social development of the peoples of developing countries, in response to Australia's humanitarian concerns as well as Australia's foreign policy and commercial interests". Australian IDAB (1990). Similar utterances are echoed by New Zealand:

> "New Zealand's overseas development assistance programme is designed primarily to assist the world's developing countries by providing assistance that better enables them to meet their own economic and social needs ... It also contributes to the achievement of New Zealand's own external relations and trade policies by strengthening international economic prosperity, maintaining peace, security and stability and protecting the global environment."
>
> *New Zealand Ministry of External Relations and Trade, 1989.*

The area of concentration for the aid programmes of these two donors is given as the Asia-Pacific region, highlighting the strategic, commercial and political interests of these donors.

Between 1976/77 and 1985/86 total Australian aid to the PICs increased from 3.7 to 8.4 per cent of its bilateral programme, excluding aid to Papua New Guinea. This compares with over 84 per cent of the New Zealand aid programme directed to the same countries in 1985 Australian IDAB (1987); New Zealand Ministry of Foreign Affairs and Trade (1985).

The distribution of this aid by main purposes within recipient economies provides some interesting comparison between Australia and New Zealand over the period 1987 to 1988, as shown in *Table 6*.

Table 6. Australian and New Zealand bilateral aid by major purposes: commitment as a percentage of total

	Australia		New Zealand	
	1987 %	1988 %	1987 %	1988 %
Education	19.8	15.8	29.4	52.6
Transport & communication	6.4	7.9	2.7	2.2
Agriculture	8.2	6.1	10.9	6.8
Trade, banking and tourism	0.4	0.7	1.8	6.3
Program aid	38.7	50.2	24.9	13.3
Others	26.5	19.3	30.3	18.8

Sources: OECD, 1988: 192-93; OECD, 1989: 232-33.

In the case of Australia, budgetary contributions to Papua New Guinea accounts for the bulk of its aid programme designated under the 'programme aid' category. Although not as large, the New Zealand aid programme also contains a similar item for the Cook Islands and Niue. The reduction observed for 1988 is due in part to the decision by the New Zealand Government to phase out this support to the Cook Islands over a 20 year period. Education was the second priority area attracting Australian aid. However, the situation was reversed in the case of New Zealand aid where the bulk of bilateral resources was channelled to the education sector. Agriculture, transport and communications were the other main areas attracting both Australian and New Zealand aid.

6. *Aid and development policies in the PICs*

Aid has had a direct influence on the direction of development in the South Pacific, and on the policies which have emerged. This assertion is based on a number of observations:

(a) The bulk of development resources are financed by aid. While recipients are perceived to have the final say in the identification of their development needs, the donors also have the right to refuse funding of any project they are not comfortable with. In essence, what is happening is that the PICs development has tended to be shaped by the type and form of aid available.

(b) Expatriates working in key ministries within the PICs have a tendency to promote their government's views about development rather than what is appropriate for the PICs. Locals who receive their training in overseas institutions also tend to be sympathetic to ideas and policies about development which are dominant in the country of their training.

(c) A lack of rigour in the planning apparatus of the PICs governments has led some donors to assume a greater role and influence in project identification, and hence in the pattern of development in particular countries.

In brief, aid to the PICs has shaped the development policies of these countries: directly through the selective process of project and programme funding, and indirectly through the influence exerted by aid personnel as well as locals who were trained in donor countries.

The PICs see no major difficulties in donors having their own ideas about how development in the region should proceed. Whether the PICs should accept or be forced to accept these ideas is a different matter. Ideally donors should take the lead, if they wish to do so, from the PICs development objectives and not their own. In practice, however, the PICs have a much better chance of obtaining aid funding if their philosophy about development falls in line with those of the donor involved.

More recently New Zealand and Australia have moved towards framing for themselves a much more integrated and less fragmented profile of their aid programme to the region than in previous years. One of the approaches adopted to achieve this end has been the preparation of country papers which set out the preferred framework for donors' assistance. The sombre effect of this exercise is to make these donors' ideas and preferences much more explicit to the PICs in terms of where and how they would like their aid to be spent.

In general the PICs welcome the views and opinions of donors on how best they could proceed towards development. However, there is also a strong and firm belief within these countries that aid donors should not always regard themselves as the source of all knowledge in the Pacific.

It is difficult to envisage the PICs being independent of aid in the future, especially the micro-states. However, some measures have been instituted in an attempt to minimise this dependence, for example the Tuvalu Trust Fund and the Kiribati Revenue Equalisation Reserve Fund referred to earlier.

II. Education in the Pacific Island Countries

Individual the PICs have educational needs and systems of education which are, for the most part, the product of missionary and colonial influences. Most PICs have a very poor natural resource base. For many, the only real resource at their disposal for development is people. It is, therefore, not surprising to hear Pacific islanders promoting education as one of the more practical solutions to their development predicament and as a way of acquiring standards of living prevalent in the donor countries. The link between education and development in the PICs is strong.

Before the arrival of the missionaries Pacific education was promoted through two main institutions: the family and the community as a whole. This education was simple and closely mirrored everyday activities such as fishing, canoe making, cooking, mat weaving, the art of debating etc. Learning was through observing actions and the manner in which these activities were performed by the older members of the society.

The arrival of the missionaries in the islands, in the early nineteenth century, signalled a turning point in the history of Pacific education. The London Missionary Society (LMS) arrived in the Cook Islands in 1823 and seven years later landed in Western Samoa. In Fiji the Methodists were the first to arrive (in 1835). The missionary influence on Pacific education was immense. The main goal of education preached during this period was the training of locals so that they could assume positions within the church. Yet it can also be argued that the missionary period was responsible for the colonisation of the minds of the peoples of the Pacific. Pacific islanders were led to believe that the source of all knowledge resides with those from far away lands and that these people always know best, a mentality which unfortunately still lingers in parts of the Pacific.

The most striking feature of education during colonial occupation was the complete disregard by colonial administrators for the needs of the indigenous people in the school curriculum. In the Cook Islands in the 1880s for example, the British Resident decreed that education should be closely aligned to the needs of industrialisation, a completely foreign and inappropriate assumption as far as Cook Islanders' needs and aspirations were concerned. The dominant educational philosophy during this period was that the aspirations of the local people matched those of the outside world. However, this philosophy remained a little more than rhetoric when it came to the provision of educational opportunities for the population as a whole. In the Cook Islands the strong and unequivocal belief was that the local natives did not have the need, right or ability to aspire to universal standards in education Cook Islands Task Force on Education (1989).

The success of the changes and initiatives introduced into the education system by the missionaries and the colonial administrators was largely due to the clever involvement of the local chiefs. In many ways the colonial period heralded a low point in Pacific education. Economic considerations, and the emergence of the modern sector in the PICs economies, combined to push educational goals squarely in favour of western type education. It was also a period in which most of the indigenous people and indentured labourers were seen by the colonial administrators as nothing more than cheap labour. Education for these people was perceived to be an unwelcome intrusion.

Towards the end of colonial occupation the goals of education came to be seen more in terms of preparing locals to replace the departing expatriates. As a consequence, the curriculum was heavily academic in nature and totally divorced from preparing the majority of the student population to live useful and productive lives in rural settings. What the PICs inherited from their departing colonial masters were inappropriate and expensive systems of education.

In the 1980s Pacific education still exhibits features inherited from the colonial period. The critical task of replacing imported ideas and systems of education with those which are geared towards meeting local needs has proved elusive, although some progress has been made. But this should not be interpreted as an argument for isolation from the rest of the world. What is needed is a system of education which is best suited to local conditions, but which is also open to controlled outside influences in such areas as science, technology, and language.

1. Critical areas for educational development

Although all the PICs have recognised the vital role education plays in the development process, each saw education achieving different objectives in the context of their development efforts and the constraints under which they operate.

In 1989 the author undertook a major review of the PICs perceptions of education development needs and aid requirements. Six countries were visited (Cook Islands, Fiji, Kiribati, Tuvalu, Vanuatu and Western Samoa) and interviews conducted with senior public servants and politicians. *Table 7* summarises the priority areas perceived by Pacific islanders as requiring urgent aid assistance. These were the same areas where the PICs strategies for educational development were concentrated.

Table 7. Priority areas for urgent educational aid

	Cook Islands	Fiji	Kiribati	Tuvalu	Vanuatu	Western Samoa
Curriculum development	x	x	x	x	x	x
Overseas training	x	x				x
Equipment, reading and teaching materials	x	x	x	x	x	x
Buildings			x			x
Technical assistance			x		x	
Accommodation for teachers in outer and rural areas		x			x	

Three of the most critical needs are (i) curriculum development, (ii) facilities, equipment and teaching materials, and (iii) qualified teachers. Each will be discussed in turn.

(i) Curriculum development

The PICs perceived curriculum development as the most potent tool for making education more relevant to local needs and environments. But curriculum reforms involve other important areas such as language, examinations, local participation in curriculum development, finance, availability of appropriate teaching materials and qualified teachers.

In general, it would appear that there is a relationship between the level of development attained by the PICs and the level of education which receives priority attention. However, this does not necessarily mean that a PIC which has identified post-secondary education as its top priority, neglects development in other areas. In Fiji the country's last two Development Plans (1980, 1985) gave tertiary, technical and vocational education very high priority. This was because these three levels have a " ... direct relationship with Fiji's middle level manpower requirements". Fiji Government (1985). However, the same Development Plans also recognised that curriculum reforms aimed at meeting these needs must begin, at least, from the upper secondary level.

In Kiribati, the main challenge for curriculum development was " ... how to balance the needs of the bulk of the students who will spend their lives working mostly in the traditional subsistence sector, against those who will work in the modern sector". Kiribati Government (1988). This has led the country's curriculum unit to concentrate its effort at the primary level.

Similar concerns can be found in Vanuatu where between 75 to 80 per cent of those who enter primary school leave at the end of that cycle Vanuatu Government (1989). Overall, however, Vanuatu's most immediate concern is with the unification of its two existing curricula, while maintaining English and French as the two mediums of instruction in schools.

But despite these efforts and concerns, the curriculum in the PICs has continued to be driven by the white collar aspirations of both parents and students. As a result, the balance in the curriculum is heavily in favour of the academic stream. This problem was raised by the Western Samoa Department of Education when it noted that:

> " ... although educators have made earnest endeavours to fashion the curriculum more to fit the Samoan setting, the bulk of programmes, particularly in the upper primary and secondary levels, still closely resemble those of the pre-independence era."
>
> *Western Samoa Government, 1984.*

The role of educational aid in perpetuating this continued dependence needs to be fully assessed.

One area where the diversity of the PICs is best illustrated is that of language. Most PICs use the vernacular for lower level education and increasing amounts of English or French as the child progresses up the education ladder. This practice appears to be based on the assumption that before children can successfully master the skills in a foreign language, they must first be conversant in their own mother tongue Dutcher (1986). The need to identify a unifying language capable of satisfying the requirements of the majority of the population is more pronounced in countries such as Vanuatu and Solomon Islands, where there are more than 200 different languages spread over 80 islands Teasdale; Murphy (1990). The implications of this in terms of the provision of textbooks and other teaching materials written in a foreign language, and funded by aid is of grave concern, especially for primary schools. But for countries such as Vanuatu and Solomon Islands there is another concern – that of the scattered and dispersed nature of their population. The concern is that in identifying a language which is more appropriate to the needs of the majority, there is also the real danger that some of the small and isolated communities with their unique and distinct language and culture will slowly but surely be destroyed.

The question of examinations is an important consideration for any proposed changes to the curriculum. This is because of the existing relationships between Pacific and metropolitan curricula, and the fact that until very recently examinations set in Australia, France, New Zealand, and the United Kingdom were the major yardsticks for assessing educational achievement in the Pacific. With these examinations now a thing of the past in many PICs, the need to align locally set examinations with the curriculum is vital.

(ii) Facilities, equipment and teaching materials

The provision of adequate facilities, equipment and teaching materials is one of the major problems facing education in the Pacific. For example, in a survey conducted by the Kiribati Ministry of Education, it was found that:

- 75 per cent of classrooms were ill maintained;
- out of 462 teachers, 120 had no tables or chairs; and
- 4,000 pupils had either no desks or no chairs (Kiribati Government, 1988).

In Vanuatu a similar situation exists where, in 1984/85, only 24 per cent of English and 32 per cent of French schools had adequate desks and chairs for the student population. In the areas of textbooks and other teaching manuals only 17 and 20 per cent of English-medium and 41 and 47 per cent of French-medium schools were found to have sufficient supplies of these materials Vanuatu Government (1989).

In Tuvalu overcrowding of classrooms is widespread. For instance, classrooms built to cater for 30 students were used to accommodate twice this number Tuvalu Government (1988).

Throughout the PICs the above situation is the norm rather than the exception. A growing young population entering schools has put additional pressure not only on the central government but on the local island and village communities for additional facilities to cater for this increase.

(iii) Qualified teachers

One of the most acute and chronic problems facing Pacific education is the lack of qualified teachers who are prepared to stay in the profession. Qualified, trained and competent teachers are central to any attempt to improve the standards of education as well as making a valuable contribution to curriculum reforms. In addition, their role as facilitators and implementors for curriculum development is extremely important. This latter point is highlighted in the case of Kiribati where it was reported that over 70 per cent of the primary school teaching force would not be able to cope with any changes to the existing primary school curriculum Kiribati Government (1988).

Because of the shortage in qualified teachers, most PICs governments have been placed in a situation where some of the teachers recruited fell short of the minimum standards set by education boards. Even the most developed of the PICs cannot escape from this problem. In 1975 for instance, 17 per cent of Fiji's primary school teachers were considered to be unqualified. However by 1984 this figure had been slashed to 1 per cent Fiji Government (1985). In Vanuatu 32 per cent of the teachers employed in 1986 were considered to be below acceptable standards set for trained teachers Vanuatu Government (1989).

The measure of concern throughout the PICs with this problem has been reflected in the establishment, in most countries, of primary teacher training institutions. But the question of quality remains a major concern, as is the issue of keeping trained teachers within the profession. The former has been the subject of a research project recently completed by Throsby and Gannicott (1990) in the Pacific islands.

Each PIC aspires to free and compulsory education for its peoples. However, while some progress has been made, especially at the primary level, it is difficult to see all the PICs achieving this aim, given the costs involved and the fragile nature of their economies.

Because of the scattered nature of some PICs, the issue of balanced and equal education provision on all islands, and not just in the centre, is of great significance. The establishment of multigrade classes is one method which has been employed to ensure that small pockets of the population, especially on outer islands, are not disadvantaged because of the costs involved in the delivery of education services.

The accommodation of teachers is also a major issue for those PICs, such as Fiji and Vanuatu, where the population is scattered over a large number of islands. To overcome this problem the PICs governments have a policy whereby teachers are, whenever possible, assigned to teach in their home village or island.

2. *Educational aid*

Australia, between 1976/77 and 1985/86, channelled over 11 per cent of its total aid programme into education. Of this amount, 63 per cent was consumed by projects in universities and higher technical education institutions, 23 per cent by vocational and technical training, 6 per cent by primary and secondary education, and 2 per cent by teacher education. In the Pacific, over 20 per cent of its aid was absorbed by the education sector. It is of interest to note that aid earmarked for universities and higher technical education was used mainly to fund capital intensive activities such as buildings, sophisticated equipment, consultants, teachers and experts. In this way the bulk of these funds remained within Australia. In Africa, the situation is similar, although educational aid only accounts for 7 per cent of its total aid flow.

A recent development in the link between Australian aid and its influence on Pacific education is the introduction of *Equity and Merit awards Scheme* (EMAS). The scheme allows students from developing countries to apply directly to the Australian government for scholarships to study in Australia. It thus focuses on the needs of the individual, rather than on those of recipient countries. Recipient governments have no part in the selection process. The implications of this on the control which needs to be exerted between manpower planning and training therefore disappear. Moreover students studying under these awards are likely to feel less obligated to return to their home countries on the completion of their studies. The effects of this arrangement on the *University of the South Pacific* (USP) has been commented on by its Vice-chancellor in an article published in "*The Australian Higher Education Supplement*" (March, 1990). The claim is that Australia is attracting the 'cream' of Pacific islanders at the expense of the USP, an institution to which Australia also contributes large amounts of resources through its aid programme. But within Australian tertiary institutions there is concern about the commercialisation of higher education and its likely effect on Australian students:

> **"... by no means all university members are happy about the commercialism that has taken over, and remain concerned at the implications for the education of Australians as well."**
>
> ***Gertzel, undated.***

What is now an emerging trend in Australia's aid policy towards the education sector is the move to regard Australian education as an export industry. This is not a new concept as the idea was first mooted for Australia in the *Jackson Report* (1984). The establishment of the Equity and Merit Awards Scheme is further evidence of the path Australia has chosen to take with regard to its overall policy concerning educational aid. The entrepreneurial spirit foreshadowed in the Jackson Report is now evident in the number of Australian based consultancy agencies eager to reap the commercial benefits of such activity. Some of the adverse and undesirable effects of this type of tied aid are already emerging from the region and some hard and honest appraisals of the situation need to be undertaken before further harm is done to the PICs development in general and education in particular.

New Zealand allocates by far the bulk of its aid programme to funding projects in the education sector (53 per cent of its total bilateral programme in 1988). Aid for human resource development accounted for 22 per cent of total New Zealand aid between 1985 and 1988. Training awards for study in both New Zealand and regional institutions consumed by far the largest proportion of this aid. For example, in 1987, the training of recipient locals in New Zealand accounted for 76 per cent of total educational aid and 14 per cent for training in regional institutions such as USP. The balance between training in New Zealand and regional institutions remains unpredictable because of a number of factors including political considerations in a number of PICs. Secondment of teachers is one area where New Zealand appears to be making a positive contribution, judging by the declining number of teachers funded by New Zealand aid who were working in the PICs. For example, in 1925 17 New Zealand teachers were contracted to teach in Fiji and by 1969 190 teachers were working in schools throughout nine PICs. In 1988, only 28 teachers were on assignments in four PICs. On average, both Australia and New Zealand devote similar proportions of their aid programmes for training purposes. In 1988 for instance, New Zealand allocated 18 per cent of its total programme for this purpose and Australia 16 per cent OECD (1989).

3. Conclusion

Developments currently observed in the PICs have been shaped by a combination of factors. Without doubt, the PICs are still coming to terms with the effects of their colonial past and the subsequent integration of their economies into the western dominated capitalist global economy. Vulnerability to fluctuating world primary commodity prices and escalating costs of imports have placed the PICs in the inevitable position of high balance of trade deficits. In 1986, the collective balance of trade deficit of these countries stood at A$386,017 million. The most developed of these countries, Fiji, accounted for 62 per cent of this amount, which is 101 times greater than Niue's trade deficit for the same period, South Pacific Commission (1989).

The role of aid, overseas remittances and other forms of external investment in supplementing domestic resources is vital. But there are also the negative aspects of these types of flows which have the effect of driving the PICs into high consumption societies, especially of imported goods and services. Part of the problem can be attributed to the unrealistically high expectations and aspirations of the peoples of the Pacific to standards of living which the PICs economies could not possibly sustain without external assistance. Care must therefore be exercised by the PICs to ensure that in the rush to solve one problem they do not unwittingly create others which are even more intractable.

A lack of honest and open discussion concerning donors' real motives for aid-giving remains one of the major problems in the way of development. As long as the donor-recipient relationship continues to be heavily in favour of the donors, the proclaimed developmental objectives of aid will remain illusive Luteru (1986). This is because donors are not at present primarily concerned with the development of recipient countries but with the satisfaction of their own vested interests, whether they be political, strategic, or commercial. But there are already some welcome signs that donors are becoming more open, at least within their own constituencies, about the real motives behind their aid programmes. For instance, Australia's Minister of Foreign Affairs and Trade, in an address to the *Australian Council for Overseas Aid* supported the need for this openness in the aid dialogue when he stated:

> "I know that for various reasons, some people have been uneasy about such an open acknowledgement of self-interest, but in my view this step towards honesty and realism has been a major step towards clarity, and has been good for public discussion of aid policy in Australia." *Evans, 1989.*

There is no obvious reason to doubt that, if the same approach is adopted with respect to discussion between donors and recipients, similar benefits would not accrue.

The disillusionment with the developmental impact of aid therefore appears misplaced. To expect aid to raise developing countries' GNP, expand their trading opportunities, reduce their needs for imports and solve their manpower needs, seems naive because after all, donors were never interested in these issues in the first place.

The collective importance of the PICs to donors' self-interests is an important consideration in the distribution of aid to the Pacific region. At the global level, strategic interests appear to be the dominant motive behind giving aid to the PICs. Covering an area of about 11,5 million square kilometres of ocean, the Pacific region is strategically very important to the defence and security of both Australia and New Zealand. However, this does not necessarily mean that the political and commercial interests of these countries are not also a factor. Collectively the PICs have the potential to be a force in the political arena, especially in such gatherings as the Commonwealth and the Pacific Forum. In the commercial sphere Australia and New Zealand have benefited from Pacific trade. For example, in 1985 the net flow of resources to Australia from the PICs was calculated at over A$100 million. This figure was arrived at after subtracting total aid flow and exports earnings of the PICs from their import bill to Australia. The aid programme also contributed significantly to the commercial interests of donors. In discussions with officials of both the *Australian International Development Assistance Bureau* (AIDAB) and DAD it emerged that about 80 per cent of the Australian aid programme and 60 per cent of New Zealand's never leave these countries. It is perhaps not unexpected therefore for developing countries to label aid as just another instrument of neo-colonialism.

In the education sector, the available evidence suggests that the principal motives for Australian and New Zealand educational aid to the PICs have been political and commercial in nature.

As noted earlier in this chapter, the bulk of educational aid directed to the PICs by Australia and New Zealand is towards such areas as *overseas training, technical assistance*, and other *capital intensive projects*. This type of assistance clearly favours the commercial interests of donors and is not congruent with the priority areas identified by the PICs for aid assistance.

The PICs can no longer afford to be complacent in their dealings with the aid community. They must have the courage of their convictions to say no to projects which would obviously mortgage their resources and peoples in the future and be of no real benefit to them. Part of this process must also involve an honest evaluation of the need for aid. In the light of such reflection, the question as to which actions or strategies the PICs should adopt, individually and collectively, when aid ceased, would then require some hard thinking and honest responses by all concerned.

Appendix A. Geographic and demographic indicators

	Land area km^2	Sea area km^2	Population 1987	Population density person per km^2
Melanesia				
Fiji	18 272	1 290	722	40
Solomon Islands	28 369	1 340	293	10
Vanuatu	11 880	680	150	12
Micronesia				
Kiribati	690	3 550	66	96
Nauru	21	320	8	381
Polynesia				
Cook Islands	240	1 830	17	71
Niue	259	390	3	11
Tokelau	10	290	2	200
Tonga	699	700	99	142
Tuvalu	26	900	8	308
Western Samoa	2 935	120	166	57

Sources: World Bank Report, 1989: 230.
OECD, Chairman's Report, 1988.
Pacific Economic Bulletin, NCDS, 1989: 44.
Browne; Scott, 1989.

Appendix B. Economic indicators

	GNP/Capita US$	Real growth rate 1976-86 GNP/Capita %	Real growth rate 1976-86 GNP %	Total ODA from all sources 1984-87 US$m	Dev. level	Import as % of GDP 1984	ODA as % of GDP 1983
Cook Is.	1 550	1.9	2.4	55	LMIC	88*	45*
Fiji	1 510	1.2	3.2	141	UMIC	48	3
Kiribati	480	-0.2	1.7	55	LLDC	107	69
Nauru	10 230	4.8	6.2	0	UMIC	NA	NA
Niue	1 750	5.9	2.9	18	UMIC	70@	188
Solomon Islands	420	5.7	9.4	127	LIC	75	27
Tonga	730	3.0	3.8	66	LMIC	66	30
Tuvalu	650	-	-	38	LLDC	162	105
Vanuatu	1 020	0.4	3.0	121	LLDC	90	27
W. Samoa	560	0.3	1.2	98	LLDC	61	27

Sources: 1988 OECD Report, pp. 250-253; 1989 World Bank Report, p. 230; 1987 AIDAB's 'Australia's Relations with the South Pacific', pp. 14-16; Browne and Scott, 1989: 31; OECD, 1989: 285-287.

Notes: * = 1982 data; @ = 1983 data.

Appendix C. Political and social indicators

	Year of independence	Sovereign status	Ethnic grouping	Adult literacy rate 1980 %	Life expectancy at birth years 1986 (a)	Infant mortality rate under 1 year 1980
Cook Is.	1965	Free Ass	Polynesian	91.8	70	36
Fiji	1970	Ind Rep	Melanesian	75.0	70	26
Kiribati	1979	Ind Rep	Micronesian	95.0	68	38
Nauru	1968	Ind Rep	Micronesian	-	-	-
Niue	1974	Free Ass	Polynesian	100.0	-	-
Solomon Islands	1978	Ind State	Melanesian	51.0	68	38
Tokelau	-	NZ Trust/Terr	Polynesian	-	-	-
Tonga	NA	Monarchy	Polynesian	99.6	65	36
Tuvalu	1978	Ind State	Polynesian	98.0	68	38
Vanuatu	1980	Ind Rep	Melanesian	-	63	10
W. Samoa	1962	Ind State	Polynesian	97.8	65	13 (b)

Sources: World Bank Report, 1988: 289 and 1989: 230; Pacific Economic Bulletin, NCDS, 1989. Browne and Scott, 1989; AIDAB, Australia's Relations with the South Pacific, March, 1987.

Notes:
(a) Life expectancy for Fiji, Kiribati, Solomon Islands, Vanuatu and Western Samoa are for 1987.
(b) Data for 1982.

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